RESIDENTIAL ENERGY EFFICIENCY REBATE PROGRAM (REEP)

Processing, Quality Assurance, Inspection, Initiate Payment Procedures

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VERSION HISTORY

- **September 8, 2021 – April Fernandez – (Approved by PM)**
 - ✓ Combined all REEP Procedures into one document
- **September 28, 2021 – April Fernandez – (Approved by PM)**
 - ✓ Inspection Section redone to match "Inspection Manual and Procedures"
- **November 3, 2021 – April Fernandez – (Approved by PM)**
 - ✓ **Requirements for Mail In, Online, and Mobiles** have been edited to include:
 - Procedure for "Install Address" or "Job Location" found on the invoice
 - Reducing the incentive when customer pays less than incentive
 - Confirming one piece of information for **Mobile and Online applications ONLY** (Applicant to match COR)
 - Calling customer if invoice states customer purchased 2 of the same type of equipment
 - Adding [Nexant will place on Team Lead Review] to sections Nexant will be placing on TLR due to inability to locate information.
 - GS rate code has been updated to include information on matching the install address to the application
 - ✓ Added examples in **Appendix** for "Install Address" or "Job Location" verbiage on Invoices
 - ✓ Added examples in **Measure Section** of ALL applications on reducing the incentive
 - ✓ Added information if invoice states 2 of the same measure were purchased, but only applying for 1 for ALL applications under **Measures Section**
 - ✓ Changed verbiage for furnace permit requirements under **Product Specifications and Rebates by Measure**
 - ✓ Removed Step 11 from **Mobile Application** and Step 9 from **Online Application Procedure**
 - ✓ Added **FAQ** for Electric to Gas Appliances
 - ✓ Added bullet in **FAQ: When will you notate?**
 - ✓ **QA Procedure** has been updated to reflect changes made in Processing
 - ✓ **Check Reissuance Procedure** has been updated to reflect new process
 - ✓ 2021 Incomplete Missing Signature added to **Incomplete Email and Let**
- **December 1, 2021 – April Fernandez – (Approved by PM)**
 - ✓ Acceptable Rate Code Section has been updated to include information on GM and G-10
- **December 8, 2021 (Approved PM)**
 - ✓ **Acceptable Rate Code** Section has been updated to include G-NGVR and GT-NGVR
 - ✓ **DNQ/INC – How to Cancel an Enrollment in the QA Procedure** has been updated
 - ✓ **FAQ: "Are approval emails acceptable?"** has been updated for Hirsch invoices
 - ✓ **Requirements for Online and Mobile Application** have been updated to include a note when matching Applicant to Customer of Record (COR)
- **December 14, 2021 – April Fernandez – (Approved by PM)**
 - ✓ Solar Thermal Water Heater Rebate information has been added to the Product Specifications and Rebates by Measure Section
 - ✓ Mail in and Online Application Processing Information Section has been updated to include Solar Thermal Water Heater Rebate processing information
- **December 21, 2021 – April Fernandez – (Approved by PM)**
 - ✓ Pricing Date (2022 IO) has been added to the procedures
 - ✓ Kicker has been moved to the Appendix

- ✓ QA Section: Application Workflow – General Application Information was updated to include 2022 Pricing Date

- **January 5, 2022 – April Fernandez – (Approved by PM)**
 - ✓ 2022 REEP Application added in Appendix
 - ✓ "Itemized Receipt/Invoice" in Requirements for Mail in Applications was updated with verbiage about invoices stating "Term(s)"
 - ✓ "Term(s)" updated was also made in Requirements for Online and Mobile Applications
 - ✓ When Do You Need Inspections? Section has been updated with directive on how to proceed with applications who were chosen at random for inspection, cancelled due to unresponsiveness, and reapply
 - ✓ FAQ "What will we do when we discover an item has been returned/cancelled?" has been updated with a new procedure
 - ✓ Inspection Section was updated with "Cases for Mandatory Inspection" to reflect changes made in processing
 - ✓ QA Section was updated with "Term(s)" information on invoices
- **January 10, 2022 – April Fernandez – (Approved by PM)**
 - ✓ Procedures for "Solar Thermal Water Heating Enrollments" have been added under the Processing Section
- **January 12, 2022 – April Fernandez – (Approved by PM)**
 - ✓ Guidelines for when a customer purchases 2 Tankless Water Heaters has been updated in Requirements for Mail in, Online, and Mobiles
- **January 14, 2022 – April Fernandez – (Approved by TL/PM)**
 - ✓ Hirsch Approval email added to Appendix Section as well as new directive for adding approval letter updated for FAQ
 - ✓ New FAQ question has been added regarding TWH to TWH seen in Double Dip
 - ✓ QA Section has been updated with Hirsch Approval directive under "Minimum QA Requirements"
- **January 25, 2022 – April Fernandez – (Approved by PM)**
 - ✓ Missing "Installation Date" has been updated in "Processing Information Section" in Mail in Application Section
 - ✓ QA Section and Inspection Section have been updated to reflect changes for missing installation date for Mail in Applications
- **January 28, 2022 – April Fernandez – (Approved by PM)**
 - ✓ Pricing Date (2022 IO) has been updated to reflect 2021 IO funds being depleted as of 01/27/2022
 - ✓ "Cases for Mandatory Inspection" has been updated in the Inspection Section
- **February 24, 2022 – April Fernandez – (Approved by PM)**
 - ✓ Pricing Date (2022 IO) has been updated to include updated scenarios
 - ✓ "Reference Table" under Double Dip section has been updated for Solar Water Heaters
 - ✓ FAQ "Are pictures for model numbers acceptable when the invoice lists only a manufacturer and not the model number?" has been updated to include CF2R
 - ✓ "Storage Water Heater" under Product Specifications and Rebates by Measures section has been updated to reflect new SWH information
 - ✓ "Solar Thermal Water Heater" under Product Specifications and Rebates by Measures section has been updated to reflect new minimum UEF
 - ✓ Inactive Account Scenario Procedure & Guideline section has been updated to include information when scenario is not addressed

- ✓ Pool Heater and Fireplace Insert List QPL have been updated.

- **March 7, 2022 – April Fernandez – (Approved by PM)**
 - ✓ New FAQ "What application should the customer fill out if purchases in one year but installed in another?" has been added.
 - ✓ New FAQ "How should we handle an application where the customer would like us to hold their rebate check?" has been added
 - ✓ "Payee Section" under Online Application has been updated to include information on "Individual Completing the Application"
 - ✓ "Reference Table" under Double Dip section has been updated
- **March 28, 2022 – April Fernandez – (Approved by PM)**
 - ✓ Pricing Date (2022 IO) has been updated with an updated Scenario 5
 - ✓ All letters under Incomplete Emails and Letters section have been updated to include End of Submission Date when applicable
 - ✓ All letters under Disqualification Emails and Letters section have been updated to include Start and End of Submission Date when applicable
 - ✓ Furnace and Solar Water Heater measures have been updated to include "Limit 1 per household" and all other measures updated to allow for more than 1 under Product Specifications and Rebates by Measures.
- **April 29, 2022 – Stephany Lopez – (Approved by Latisha Wilkins)**
 - ✓ Fixed links on "**When do you need Inspection?**" section
 - ✓ Created a new section called "**Our REEP Team**" so user knows who is doing what.

Our REEP Team

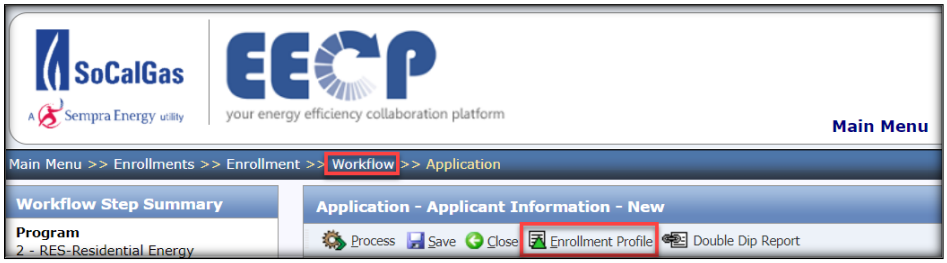
Below is a list that states currently what person is doing what role. This section has been updated as of April 29, 2022.

Elizabeth (Liz) Recinos	erecinos@socalgas.com	Manager
Latisha (Tish) Wilkins	lwilkins@socalgas.com	Team Lead – Processing
Brooke Butler	bbutler@socalgas.com	Team Lead – Quality Assurance, Inspection, & Initiate Payment
Sara Perez	sperez2@socalgas.com	Advisor (EIC)
Rhoda Weatherall	rweatherall@socalgas.com	Quality Assurance
Amanda Perez	aperez2@socalgas.com	Initiate Payment Specialist
Kimberly Payes	kpayes@socalgas.com	Inspection Specialist

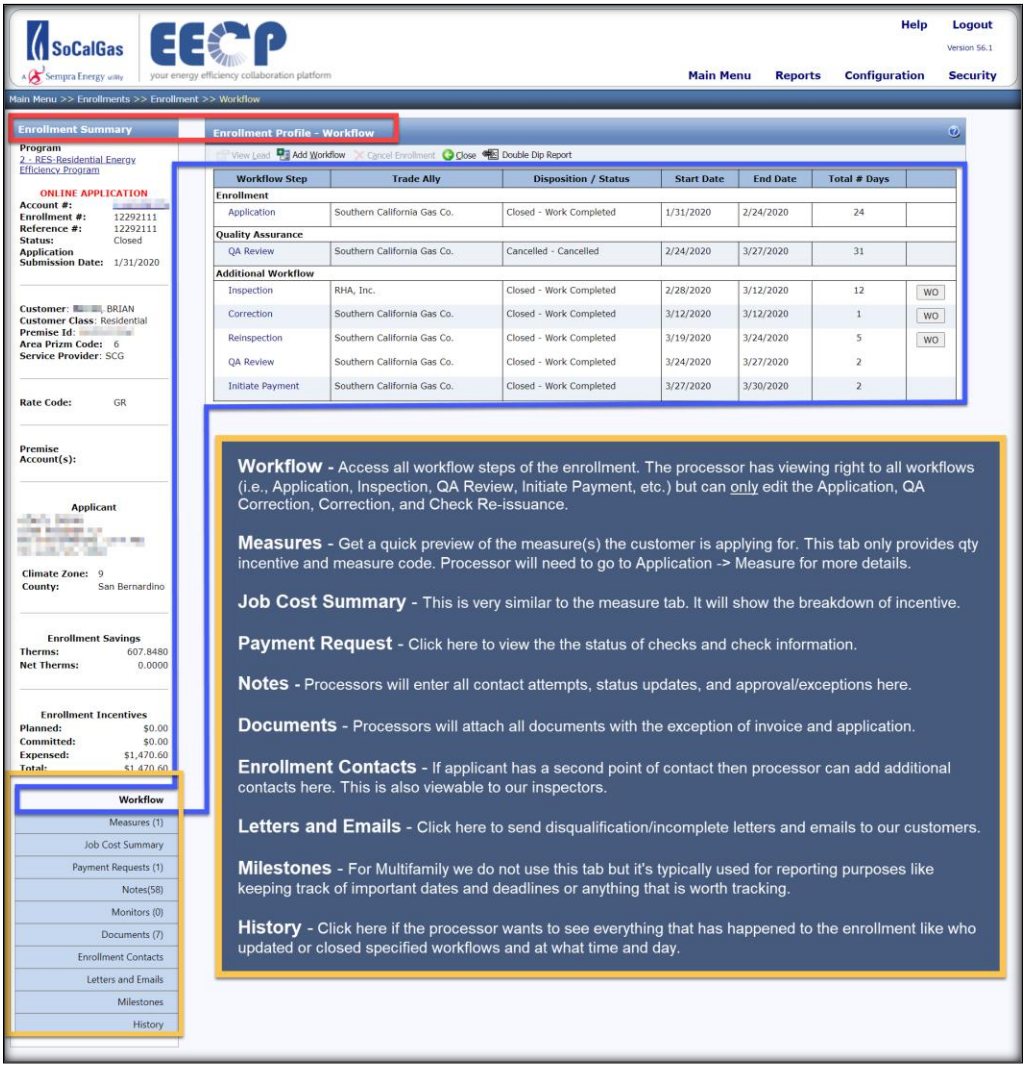
Understanding The Enrollment Profile

The enrollment profile consists of ten sections: Workflow, Measures, Job Cost Summary, Payment Request, Notes, Documents, Enrollment Contacts, Letters and Emails, Milestones, and History.

To get here the processor can click on “Workflow” or “Enrollment Profile” on the top when inside the application workflow.



Once inside the Enrollment Profile the processor can visit all ten-tab sections on the left side under the *Enrollment Summary.* The image below provides a brief description of what the processor can do/find within each tab. Later in this document, it will go into further explanation. For now, this is only a quick snapshot.



Processing

DESCRIPTION

This section's purpose will assist processors with guidelines, information, and instructions to perform Application Workflow processing function in Energy Efficiency Collaboration Program (EECP) before moving the enrollment to Inspection Workflow or Quality Assurance Review Workflow for Residential Energy Efficiency Rebates Program (REEP).

BACKGROUND

WHAT IS RESIDENTIAL ENERGY EFFICIENCY REBATES PROGRAM?

The Residential Energy Efficiency Rebates Program (REEP) is for residential single-family customers on residential rates with active meters for residential use. The program rebates **ONLY** retrofit measures in existing homes to make them more energy efficient. The measures **MUST** be installed in a residential dwelling within SoCalGas service area and **MUST** be fully constructed and occupied. Residential customers can apply through the mail in form, online, or mobile applications. New construction homes **DO NOT QUALIFY**.

WHAT IS APPLICATION WORKFLOW PROCESSING?

- Application Workflow Processing is a function to input & verify all information in EECP from the customer's application submittal or what they have entered on the online/mobile application.
- There are 3 channels provided for customers to apply for the REEP program: mail in, online, and the mobile friendly channel. Each application is different as EECP can perform required verified levels at varying degrees.

ACCEPTABLE RATE CODES

In the Residential Energy Efficiency Program there are only certain Rate Codes that are acceptable.

- GR and GR1
- GT-R (CAT Accounts)
 - These customers purchase their gas from gas marketers. Because these marketers can't transport gas to the customer's home the customer pays us transportation cost. These accounts **do qualify** for REEP rebate.
- GS (Mobile Home Park)
 - If a customer in a mobile home park pays their own gas bill and is on a GR-1 rate, they can participate in the REEP program. If the mobile home park is master metered (GS, customer does not have an individual gas account under the master meter), they can also participate in the REEP program if the Mobile Home Park owner signs over the rebate to the mobile home customer.
 - For Mobile Home Park accounts that are GS will need to apply through a Mail in Application. Mobile/Online applications will be accepted but they will need a completed Mail in Application as well.
 - The Mail in Application for Mobile Home Parks MUST have the following:
 - Section 1 and 2 filled out with the Mobile Home Parks information and account number.
 - Section 3 filled out with customers information including Tax ID or SSN to ensure check is sent to them.
 - Section 4 sign and dated by the property manager of the Mobile Home Park. (This signature indicates they are permitting the customer to apply for a rebate).

- **When processing for GS rate codes, make sure the install address from the mail in application is reflected in EECP, this includes the space number.**

❖ G-NGVR and GT-NGVR (Natural Gas Service for Home Refueling of Motor Vehicles)

Any rate code not listed above has been disabled from applying through REEP. This means, if a customer is having trouble applying, we must look up their account and determine their rate code eligibility. **[Nexant will place on Team Lead Review]**

IMPORTANT though we should no longer see the rate codes below come into REEP, if we do, please do the following and send a system DNQ email to the customer:

❖ All Master Metered (GM Rate Code) accounts will be processed under the Multi-Family Residential Rebate Program and an email sent to multifamilyrebates@socalgas.com
 - If there is a scenario where we encounter a GM rate code and it may make more sense to process through Single Family, contact Program Advisor for an exception approval. If approved, customer would need to submit mail-in application and EECP Team will need to temporarily allow the GM rate code to be processed.

❖ All Commercial & Industrial (G-10 Rate Code) accounts will be emailed to EERebatesforBusiness@socalgas.com

**For any other Rate Codes please visit the Rate Schedule to determine what program they will be processed under.

Mail in, Online, & Mobile Applications

Customers have the option to apply in one of our three platforms: Mail in, Online and Mobile. This section will go into detail on the requirements the customer needs to provide when completing the application under each platform.

Requirements for Mail In Applications

The mail in application is a physical form where the customer can apply more than one measure.

** While all sections in the application are expected to be filled out, the areas noted below are needed to complete the Enrollment**

Application packet MUST be postmarked within the program deadline and contain the following:

1) 2022 Home Energy-Efficiency Rebate Program Application – **MUST** be completed, signed and **ALL** dated with a **current date** (within the program year)
 A. Application Form
 i) Section 1 – Metering Status, Occupancy Status and Property Type
 (1) Applicant **MAY** mark the boxes but is **NOT** required.
 ii) Section 2 – Customer Information
 (1) Applicant **MUST** provide Install Address and Name (as it appears on the SCG bill).
 (2) Applicant **MAY** provide contact information but is **NOT** required.
 iii) Section 3 – Alternate Payee Information
 (1) Applicant **MUST** always fill this out if check is being issued to someone other than the Account Holder/Spouse on bill.

(a) Payments made to nonresidential customers **MUST** be reported on Form 1099 unless the payee is a corporation, or the amount paid in a calendar year is less than $600.

iv) Section 4 – Agreement and Signature

(1) Applicant **MUST** sign and print their name. Signee **MUST** be one of the following:

(a) Customer of Record (COR)

(b) Spouse/Domestic Partner (Listed in CIS)

(c) Property Owner

(i) **MUST** include proof of ownership if they are signee

(ii) If unable to verify who the signee is place on Team Lead Review. **[Nexant will place on Team Lead Review]**

(d) If the customer does not date the application, it is okay to proceed.

(i) You will use the postmark date if no signed date.

(ii) If no postmark date, you will use the install date.

(2) For HVAC **ONLY**, Licensed Contractor **MUST** provide signature and provide Close Out Permit Number and check mark the box.

(a) Applicant **MUST** provide signature and check mark the remainder boxes to acknowledge terms and conditions.

(i) If box for *"I have included proof of permit closure by the local permitting authority as an attachment"* is not checked, but the customer provided a copy of their permit per PA it is okay to proceed with the application.

B. Product Rebates

i) Applicant **MAY** apply for one or more of the same measures but will need to go through a virtual inspection. (NOTE: Application states only one per household, but for customer satisfaction we will allow more than 2 if they go through an inspection. **This is an internal rule**.)

(1) Customer **MAY** write the quantity in the measure field even though there is not a quantity field. Verify on receipt/invoice that it matches.

(2) Customer **MAY** write the rebate amount total indicating they are applying for 2 or more of the same measure. Verify on receipt/invoice that it matches.

(3) If the customer does not provide the quantity and/or total rebate amount, but their invoice shows multiple units of the same measure that **DO** qualify, processor will reach out to customer to confirm the quantity they are applying for if measure is not seen in Double Dip in another enrollment. **IMPORTANT: For customers applying for 2 Tankless Water Heaters if the invoice states they replaced a Storage Water Heater no need to confirm quantity of Storage Water Heater. At minimum replacing 1 Storage Water Heater is sufficient in receiving 2 Tankless Water Heater rebates. [Nexant will place on Team Lead Review]**

C. Energy-Efficiency Starter Kit

i) Applicant **MAY** request a starter by checking the box (Limit one kit per residential customer per three-year period)

2) Southern California Gas Bill – Customer **MAY** provide a recent bill (within the last 3 months), but it's not required.

3) Itemized Receipt/Invoice – **REQUIRED** and **MUST** contain the following:

A. Paid in full/zero balance/method of payment/PAID stamp (Cash on delivery (C.O.D.) will be accepted as proof of purchase if it's accompanied by a delivery receipt, or an install date is noted on the invoice).

i) Partial payments will be accepted if the amount paid covers the rebate amount.

ii) Financing will be accepted as a form of payment.

iii) If invoice states "Term(s) = Credit Card, Check, or Cash" the balance must reflect there was a payment made that covers the incentive amount.

iv) If customer provides a check for payment, it must be a copy of the front and back of the endorsed check or copy of the check from their bank. Carbon copy or the front of the check only will not be accepted. Please see Examples of Acceptable MOP in the Appendix.

B. Retailer/Vendor Information

i) If receipt is from Retailer, Retailer name only is sufficient

ii) If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:

(1) Contractor name and phone number
(2) Contractor name and address
(3) Contractor name and email

C. Purchase Date
D. Model number
E. Price of equipment or total price (there needs to be at least one)
 i) The customer will **ONLY** be rebated for the amount they paid up to the purchase price of the unit, this **DOES NOT** include additional charges such as shipping or taxes. For more information go to the Measures Section.

****When reviewing the invoice, if it explicitly states an "Install Address" or "Job Location" please verify it matches the Installation Address on the enrollment:**

- ✓ If the model **DOES NOT QUALIFY**, please DNQ and send the appropriate letter/email.
- ✓ If the model number **DOES** qualify follow the steps below:
 - If the addresses **DO** match, please proceed with the application.
 - If the addresses **DO NOT** match, please locate the address on the invoice in CIS. Verify the applicant is on the account. **[Nexant will place on Team Lead Review]**
 - If the applicant is in CIS on the address provided on the invoice, please reach out to the customer to confirm which address they intended to apply for. Once confirmed:
 - Tag the correct account in EECP if invoice address is correct
 - Or ask for updated invoice if invoice address is incorrect
 - Then proceed with the application.
 - If the applicant is **NOT** found in CIS on the address provided on the invoice, please INC the customer using the "2021 Incomplete Application" email/letter with the reason "Account holder for install address must fill out and sign the application. If you are the property owner…" and cancel the enrollment. **Review the application for anything else that is missing before sending the INC email/letter to the customer to ensure you send a complete INC email/letter to the customer.**

For examples, please look at Examples of "Install Address" or "Job Location" Invoices in the Appendix.

4) Proof of Permit Closure – **ONLY** for HVAC.
5) Proof of Property Ownership – **ONLY** if the applicant is the property owner and not on the account.

In addition, the processor will check in EECP for the following:

- ✓ Verify there is no Double Dip (previous participation) within the last 5 years.
 - Applying for two different programs for the same measure and for the same customer.
 - Applying twice for the same measure and for the same program.
- ✓ Verify rate code is eligible
 - GR and GT-R (CAT Accounts)
 - These customers purchase their gas from gas marketers. Because these marketers can't transport gas to the customer's home the customer pays us transportation cost. These accounts **do qualify** for REEP rebate.
 - GS (Mobile Home Park) **[Nexant will place on Team Lead Review]**
 - If a customer in a mobile home park pays their own gas bill and is on a GR-1 rate, they can participate in the REEP program. If the mobile home park is master metered (GS, customer does not have an individual gas account under the master meter), they can also participate in the REEP program if the Mobile Home Park owner signs over the rebate to the mobile home customer.
 - For Mobile Home Park accounts that are GS will need to apply through a Mail In Application. Mobile/Online applications will be accepted but they will need a completed Mail in Application as well.
 - The Mail in Application for Mobile Home Parks **MUST** have the following:
 - Section 1 and 2 filled out with the Mobile Home Parks information and account number.

- Section 3 filled out with customers information including Tax ID or SSN to ensure check is sent to them.
- Section 4 sign and dated by the property manager of the Mobile Home Park. (This signature indicates they are permitting the customer to apply for a rebate).

- **When processing for GS rate codes, make sure the install address from the mail in application is reflected in EECP, this includes the space number.**

REQUIREMENTS FOR ONLINE APPLICATIONS

The online application is an 8-step electronic form where the customer can apply for more than one measure. For example, if a customer wants to apply for two tankless water heaters or one clothes dryer and one pool heater, it can be done through this platform.

Online Application MUST be submitted within the program deadline and provide the following:

- ✓ Supporting documentation (receipt, invoice, etc.). A copy of the invoice/receipt is required and **MUST** show the following:
 - Retailer/Vendor Information
 - If receipt is from Retailer, Retailer name only is sufficient
 - If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:
 - Contractor name and phone number
 - Contractor name and address
 - Contractor name and email
 - Purchase date
 - Model number
 - Price of equipment or total price (there needs to be at least one)
 - The customer will **ONLY** be rebated for the amount they paid up to the purchase price of the unit, this **DOES NOT** include additional charges such as shipping or taxes. For more information go to the Measures Section.
 - Paid in full/zero balance/method of payment/PAID stamp (Cash on delivery (C.O.D.) will be accepted as proof of purchase if it's accompanied by a delivery receipt, or an install date is noted on the invoice).
 - Partial payments will be accepted if the amount paid covers the rebate amount.
 - Financing will be accepted as a form of payment.
 - If invoice states "Term(s) = Credit Card, Check, or Cash" the balance must reflect there was a payment made that covers the incentive amount.
 - If customer provides a check for payment, it must be a copy of the front and back of the endorsed check or copy of the check from their bank. Carbon copy or the front of the check only will not be accepted. Please see Examples of Acceptable MOP in the Appendix.
 - **IMPORTANT:** If customer's invoice shows multiple units of the same measure purchased and they **DO** qualify, processor will reach out to customer to confirm the quantity they are applying for if measure is not seen in Double Dip in another enrollment. **[Nexant will place on Team Lead Review]**
 - For customers applying for 2 Tankless Water Heaters if the invoice states they replaced a Storage Water Heater no need to confirm quantity of Storage Water Heater. At minimum replacing 1 Storage Water Heater is sufficient in receiving 2 Tankless Water Heater rebates. **[Nexant will place on Team Lead Review]**

****When reviewing the invoice, if it explicitly states an "Install Address" or "Job Location" please verify it matches the Installation Address on the enrollment:**

- ✓ If the model **DOES NOT QUALIFY**, please DNQ and send the appropriate letter/email.
- ✓ If the model number **DOES** qualify follow the steps below:
 - If the addresses **DO** match, please proceed with the application.
 - If the addresses **DO NOT** match, please locate the address on the invoice in CIS. Verify the applicant is on the account. **[Nexant will place on Team Lead Review]**
 - If the applicant is in CIS on the address provided on the invoice, please reach out to the customer to confirm which address they intended to apply for. Once confirmed:
 - Tag the correct account in EECP if invoice address is correct

- Or ask for updated invoice if invoice address is incorrect
- Then proceed with the application.

- If the applicant is **NOT** found in CIS on the address provided on the invoice, please INC the customer using the "2021 Incomplete Application" email/letter with the reason "Account holder for install address must fill out and sign the application. If you are the property owner…" and cancel the enrollment. **Review the application for anything else that is missing before sending the INC email/letter to the customer to ensure you send a complete INC email/letter to the customer.**

For examples, please look at Examples of "Install Address" or "Job Location" Invoices in the Appendix.

In addition, the processor will check in EECP for the following:

✓ Verify applicant is the COR or is on the account in CIS, property owner with proof of property ownership
- If applicant is **NOT** on the account, but one of the following matches the COR information:
 - Last name
 - Phone number
 - Email
 - It is okay to proceed with the enrollment. **Please notate what piece of information between applicant and COR matches.**
 - If one of the above **DOES NOT** match it will be INC and the COR asked to reapply.

✓ Verify there is no Double Dip (previous participation) within the last 5 years.
- Applying for two different programs for the same measure and for the same customer.
- Applying twice for the same measure and for the same program.

✓ Verify rate code is eligible
- GR and GT-R (CAT Accounts)
 - These customers purchase their gas from gas marketers. Because these marketers can't transport gas to the customer's home the customer pays us transportation cost. These accounts **do qualify** for REEP rebate.
- GS (Mobile Home Park) **[Nexant will place on Team Lead Review]**
 - If a customer in a mobile home park pays their own gas bill and is on a GR-1 rate, they can participate in the REEP program. If the mobile home park is master metered (GS, customer does not have an individual gas account under the master meter), they can also participate in the REEP program if the Mobile Home Park owner signs over the rebate to the mobile home customer.
 - For Mobile Home Park accounts that are GS will need to apply through a Mail In Application. Mobile/Online applications will be accepted but they will need a completed Mail in Application as well.
 - The Mail in Application for Mobile Home Parks **MUST** have the following:
 - Section 1 and 2 filled out with the Mobile Home Parks information and account number.
 - Section 3 filled out with customers information including Tax ID or SSN to ensure check is sent to them.
 - Section 4 sign and dated by the property manager of the Mobile Home Park. (This signature indicates they are permitting the customer to apply for a rebate).
 - **When processing for GS rate codes, make sure the install address from the mail in application is reflected in EECP, this includes the space number.**

Requirements for Mobile Applications

The mobile application is a 4-step form where the customer can only apply for one measure at a time.

Mobile Application MUST be submitted within the program deadline and provide the following:

- ✓ A copy of the invoice/receipt is required and **MUST** show the following:
 - Retailer/Vendor Information
 - If receipt is from Retailer, Retailer name only is sufficient
 - If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:
 - Contractor name and phone number
 - Contractor name and address
 - Contractor name and email
 - Purchase date
 - Model number
 - Price of equipment or total price (there needs to be at least one)
 - The customer will **ONLY** be rebated for the amount they paid up to the purchase price of the unit, this **DOES NOT** include additional charges such as shipping or taxes. For more information go to the Measures Section.
 - Paid in full/zero balance/method of payment/PAID stamp (Cash on delivery (C.O.D.) will be accepted as proof of purchase if it's accompanied by a delivery receipt, or an install date is noted on the invoice).
 - Partial payments will be accepted if the amount paid covers the rebate amount.
 - Financing will be accepted as a form of payment.
 - If invoice states "Term(s) = Credit Card, Check, or Cash" the balance must reflect there was a payment made that covers the incentive amount.
 - If customer provides a check for payment, it must be a copy of the front and back of the endorsed check or copy of the check from their bank. Carbon copy or the front of the check only will not be accepted. Please see Examples of Acceptable MOP in the Appendix.
 - **IMPORTANT:** If customer's invoice shows multiple units of the same measure purchased and they **DO** qualify, processor will reach out to customer to confirm the quantity they are applying for if measure is not seen in Double Dip in another enrollment. **[Nexant will place on Team Lead Review]**
 - For customers applying for 2 Tankless Water Heaters if the invoice states they replaced a Storage Water Heater no need to confirm quantity of Storage Water Heater. At minimum replacing 1 Storage Water Heater is sufficient in receiving 2 Tankless Water Heater rebates. **[Nexant will place on Team Lead Review]**
- ✓ Picture of Installed Equipment
 - The picture of the installed equipment though it is a required field in EECP for Mobile Applications, it is okay to proceed with the application if the picture is not provided.

****When reviewing the invoice, if it explicitly states an "Install Address" or "Job Location" please verify it matches the Installation Address on the enrollment.**

- If it **DOES** match, please proceed with the application.
- If it **DOES NOT** match, please locate the address on the invoice in CIS. Verify the applicant is on the account. **[Nexant will place on Team Lead Review]**
 - If the applicant is in CIS on the address provided on the invoice, please reach out to the customer to confirm which address they intended to apply for. Once confirmed:
 - Tag the correct account in EECP if invoice address is correct

 - Or ask for updated invoice if invoice address is incorrect
 - Then proceed with the application.
 - If the applicant is **NOT** found in CIS on the address provided on the invoice, please INC the customer using the "2021 Incomplete Application" email/letter with the reason "Account holder for install address must fill out and sign the application. If you are the property owner…" and cancel the enrollment. **Please review application for anything else that is missing before sending the INC email/letter to the customer.**

For examples, please look at Examples of "Install Address" or "Job Location" Invoices in the Appendix.

In addition, the processor will check in EECP for the following:

- ✓ Verify applicant is the COR or is on the account in CIS, property owner with proof of property ownership
 - If applicant is NOT on the account, but one of the following matches the COR information:
 - Last name
 - Phone number
 - Email

 It is okay to proceed with the enrollment. **Please notate what piece of information between applicant and COR matches.**

 If one of the above **DOES NOT** match it will be INC and the COR asked to reapply.
- ✓ Verify there is no Double Dip (previous participation) within the last 5 years.
 - Applying for two different programs for the same measure and for the same customer.
 - Applying twice for the same measure and for the same program.
- ✓ Verify rate code is eligible
 - GR and GT-R (CAT Accounts)
 - These customers purchase their gas from gas marketers. Because these marketers can't transport gas to the customer's home the customer pays us transportation cost. These accounts **do qualify** for REEP rebate.
 - GS (Mobile Home Park) **[Nexant will place on Team Lead Review]**
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 - For Mobile Home Park accounts that are GS will need to apply through a Mail In Application. Mobile/Online applications will be accepted but they will need a completed Mail in Application as well.
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 - Section 3 filled out with customers information including Tax ID or SSN to ensure check is sent to them.
 - Section 4 sign and dated by the property manager of the Mobile Home Park. (This signature indicates they are permitting the customer to apply for a rebate).
 - **When processing for GS rate codes, make sure the install address from the mail in application is reflected in EECP, this includes the space number.**

IMPORTANT: If a picture of the installed equipment is not provided for a mail in or online application it is okay to proceed as it is not a requirement for those two platforms.

***Some programs and/or measures may require additional review. When that is the case, the Program Manager will coordinate additional requirements with the Support Services Supervisor, and they will be recorded in this handbook.**

PROCEDURES

CUSTOMER INFORMATION SYSTEM (CIS)

This section will go into detail on what the processor will look for when determining if the property is eligible under the Residential Rebate program

As mentioned earlier, residential customers on residential rates with active meters (Rate Codes GR and GR-1) are eligible under this program.

WHAT IS CIS?

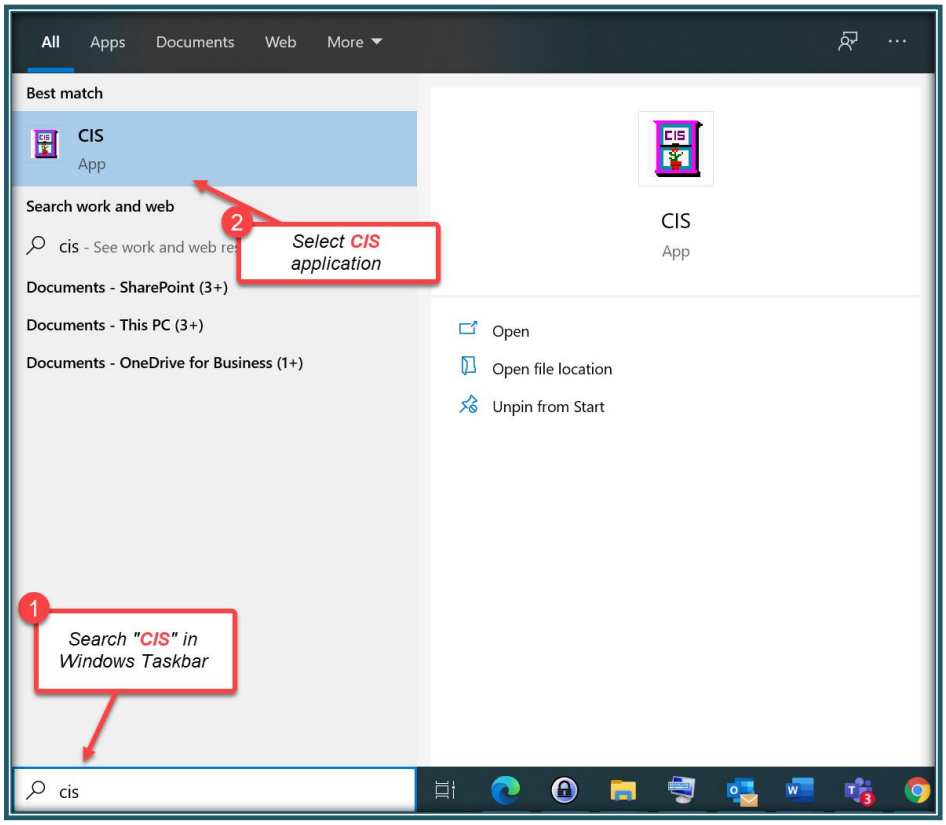
CIS is SoCal Gas's customer database; it is a tool that provides detailed information about a SoCalGas account. Processors will use this tool to verify the installed address's account information such as activity status, rate code, customer information, and alternate mailing information (if applicable).

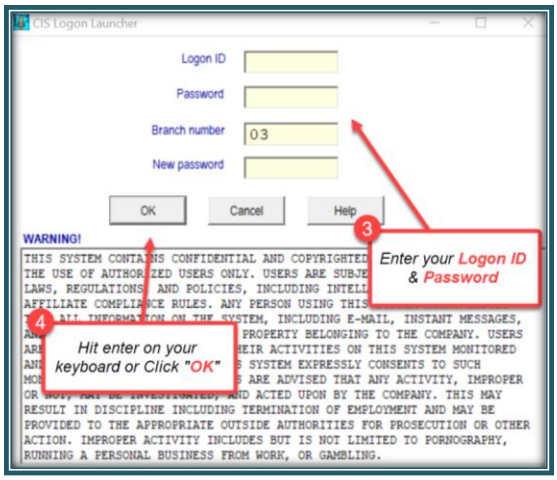
Depending on what the findings are will determine if it can be processed under the REEP program.

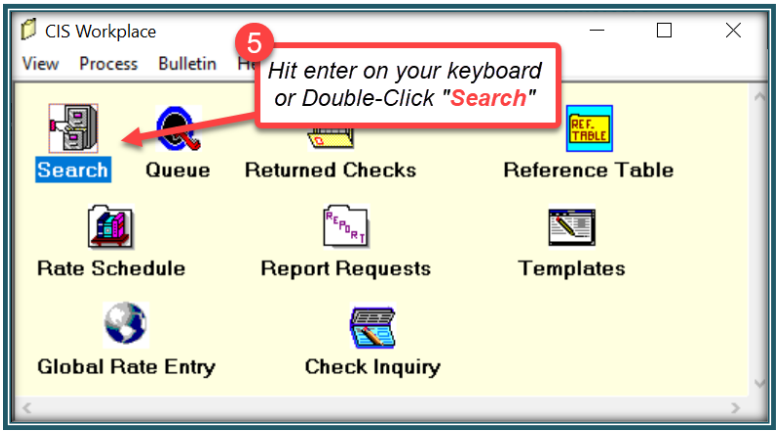
Reference CIS City Codes and Regions on tips on how to enter cities in CIS as well as those serviced by SoCal Gas.

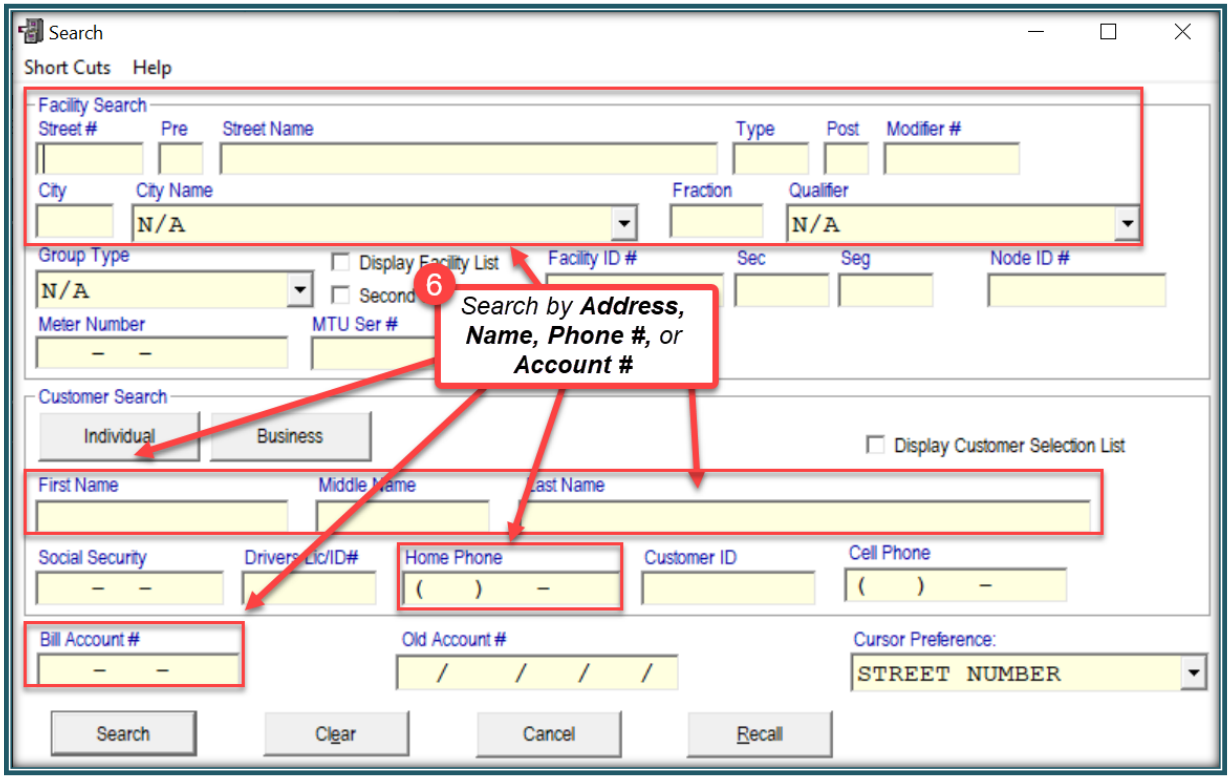
USING AND NAVIGATING IN CIS

To access CIS, do the following:

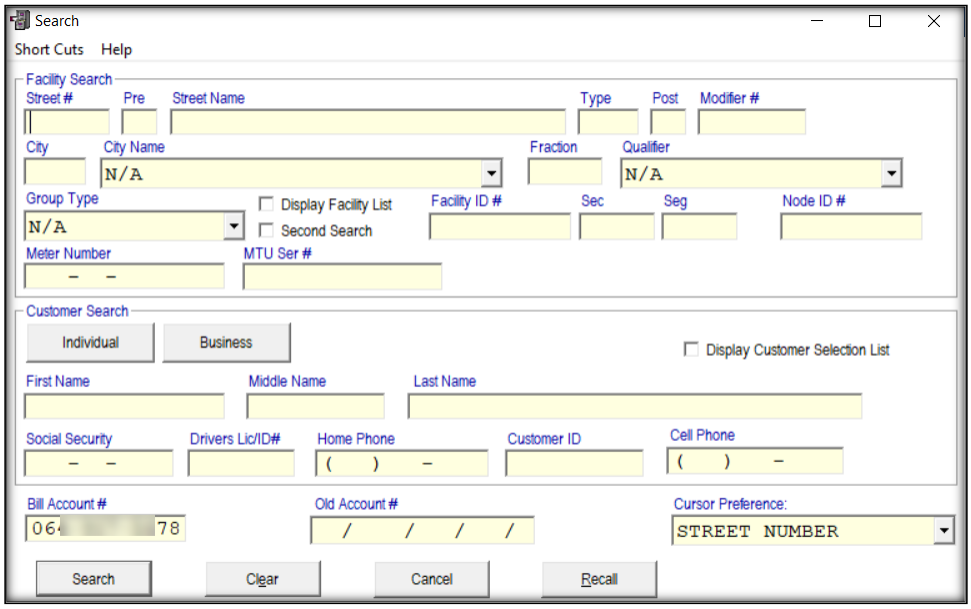



CIS Logon Launcher
Logon ID
Password
Branch number
03
New password
OK
Cancel
Help
WARNING!
3
Enter your Logon ID & Password
4
Hit enter on your keyboard or Click "OK"

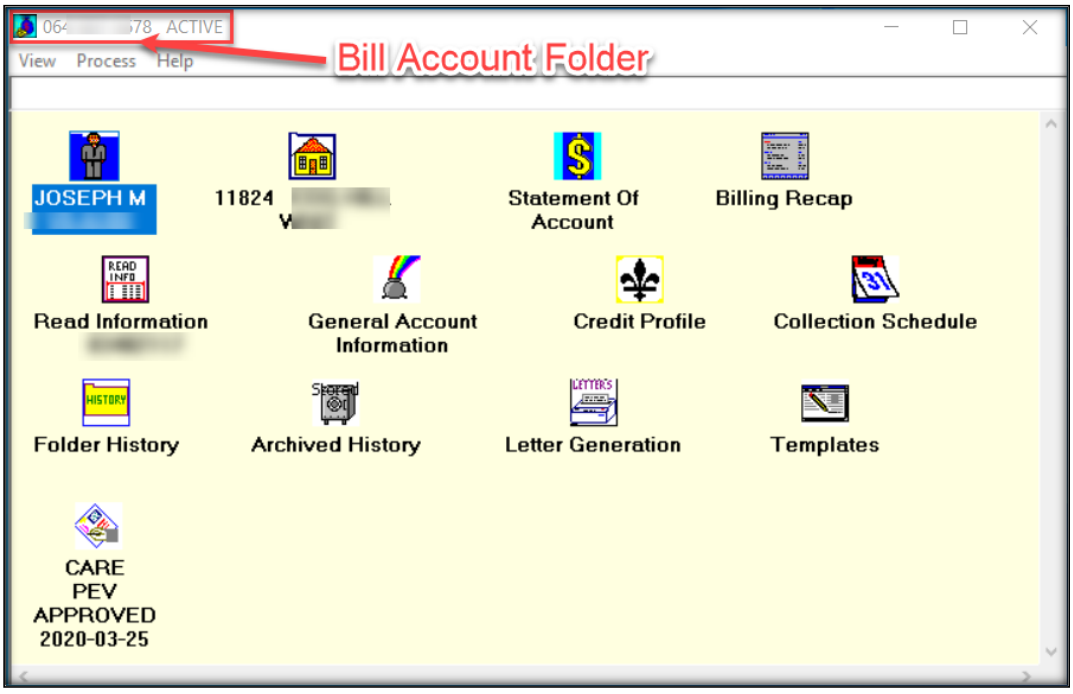

CIS Workplace
View
Process
Bulletin
5
Hit enter on your keyboard or Double-Click "Search"
Search
Queue
Returned Checks
Reference Table
Rate Schedule
Report Requests
Templates
Global Rate Entry
Check Inquiry


Search
Short Cuts
Help
Facility Search
Street #
Pre
Street Name
Type
Post
Modifier #
City
City Name
N/A
Fraction
Qualifier
N/A
Group Type
N/A
Display Facility List
Facility ID #
Sec
Seg
Node ID #
Meter Number
MTU Ser #
6
Search by Address, Name, Phone #, or Account #
Customer Search
Individual
Business
Display Customer Selection List
First Name
Middle Name
Last Name
Social Security
Drivers Lic/ID#
Home Phone
Customer ID
Cell Phone
Bill Account #
Old Account #
Cursor Preference:
STREET NUMBER
Search
Clear
Cancel
Recall

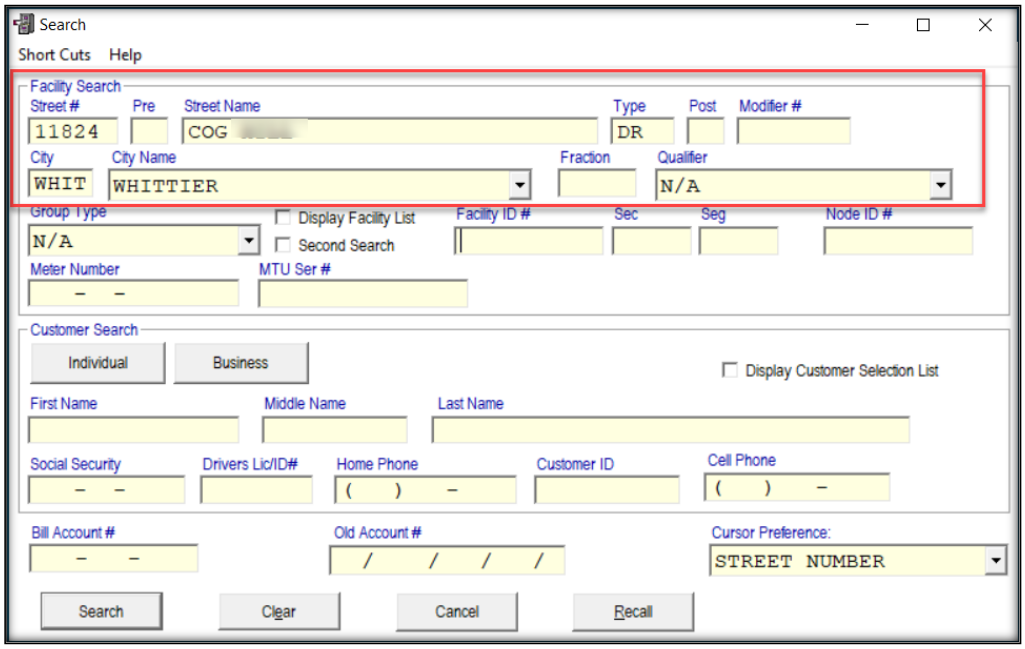
SEARCHING BY BILL ACCOUNT NUMBER



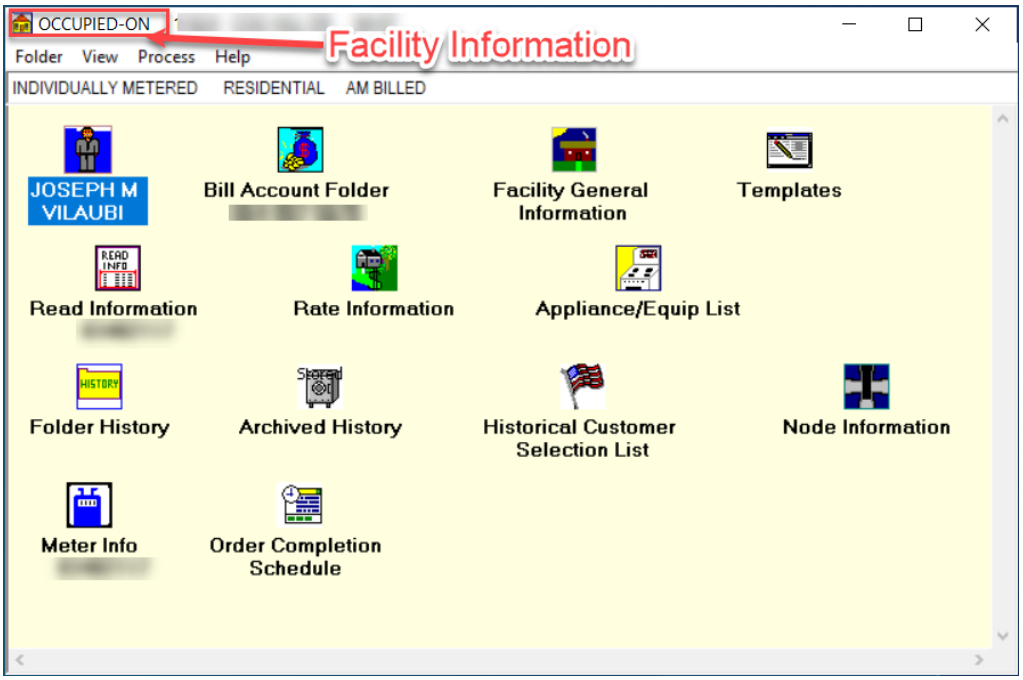
When searching by "Bill Account Number" the processor will be directed to the "Bill Account Folder" section. This section contains the customer's billing information.



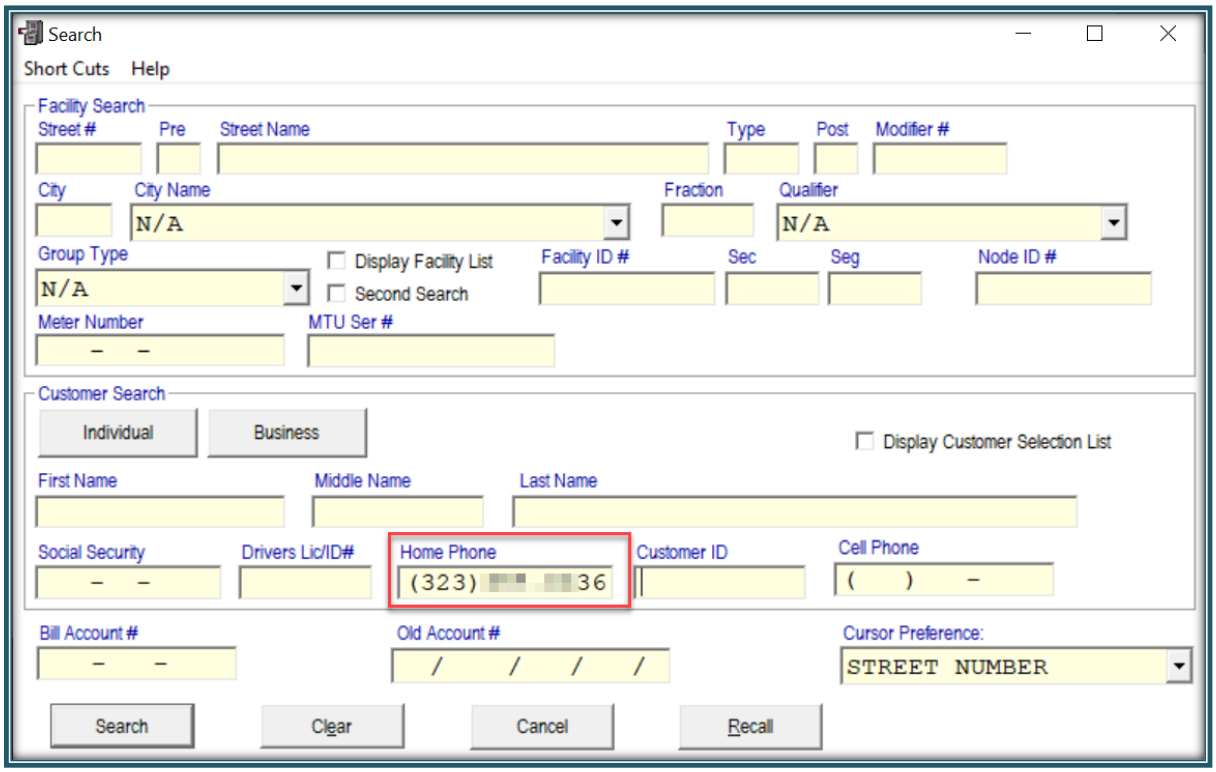
SEARCHING BY ADDRESS



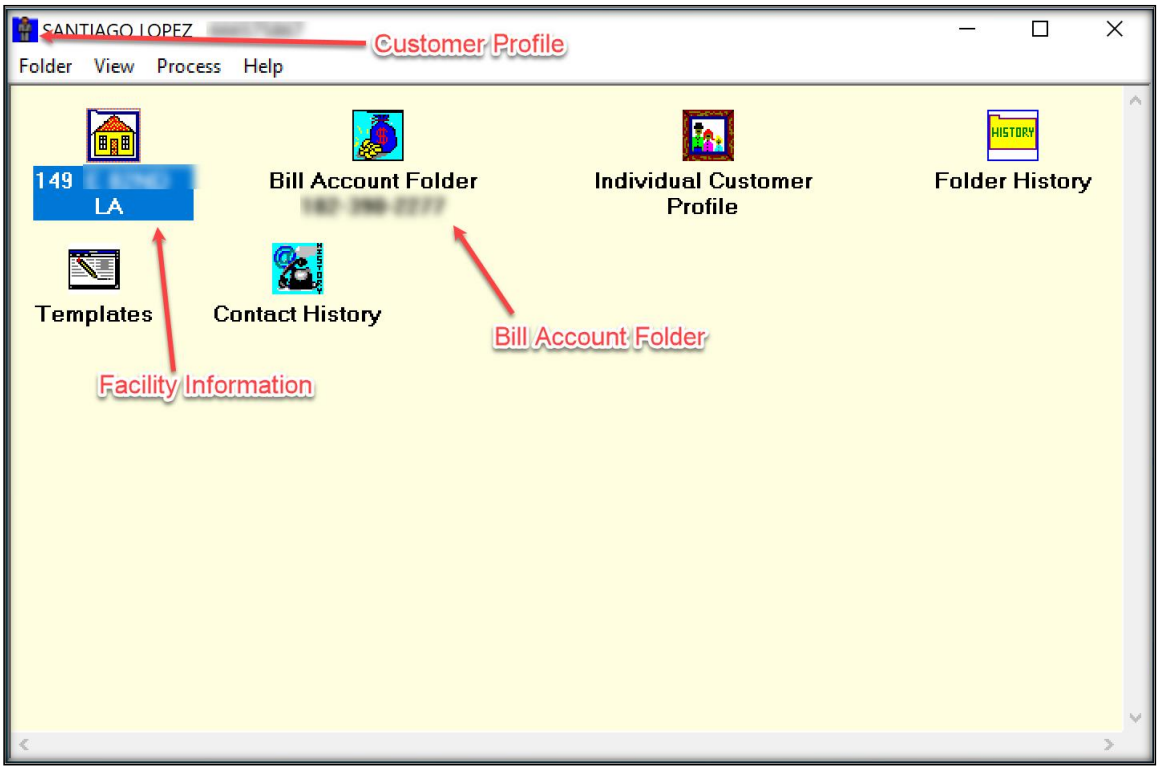
When searching by "Address" the processor will be directed to the "Facility Information" section. This section contains information on the overall facility address.



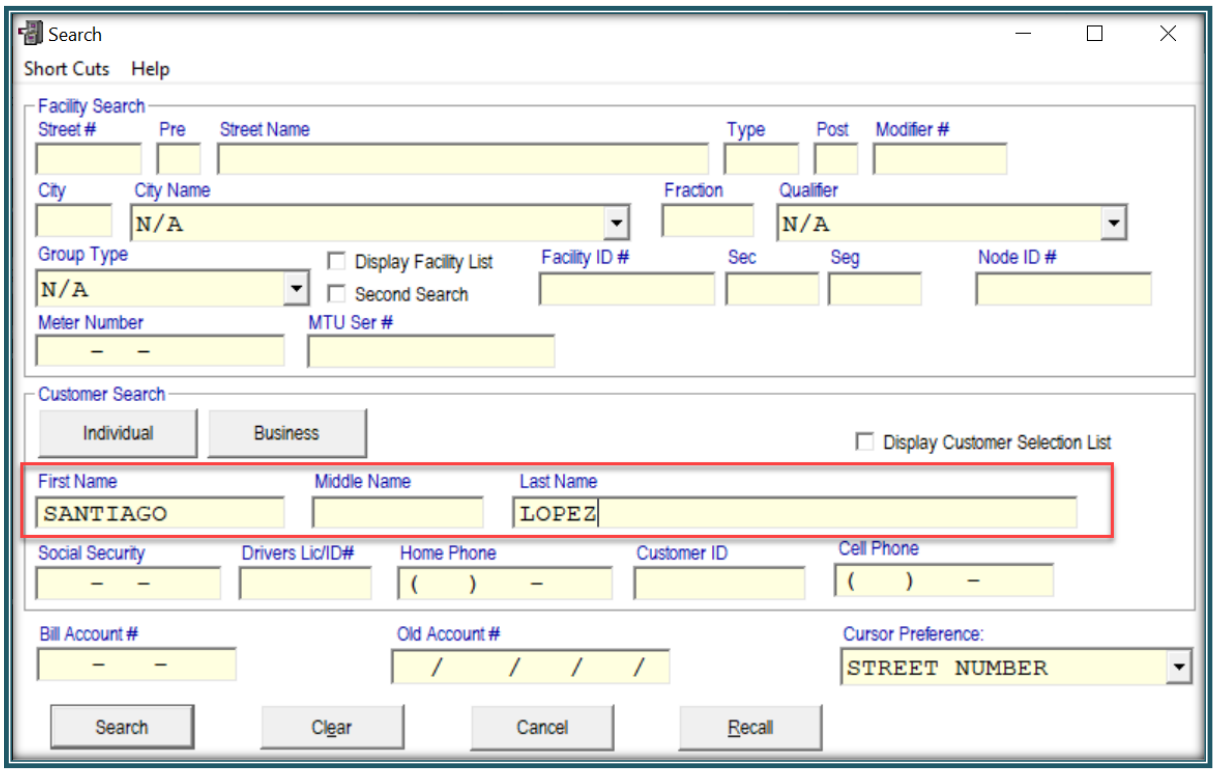
SEARCHING BY HOME PHONE NUMBER



When searching by "Phone Number" the processor will keep in mind that this is most effective when looking up actual customer name, **NOT** businesses. The processor will be directed to the "Customer Profile" and can access the "Facility Information" and "Bill Account Folder".

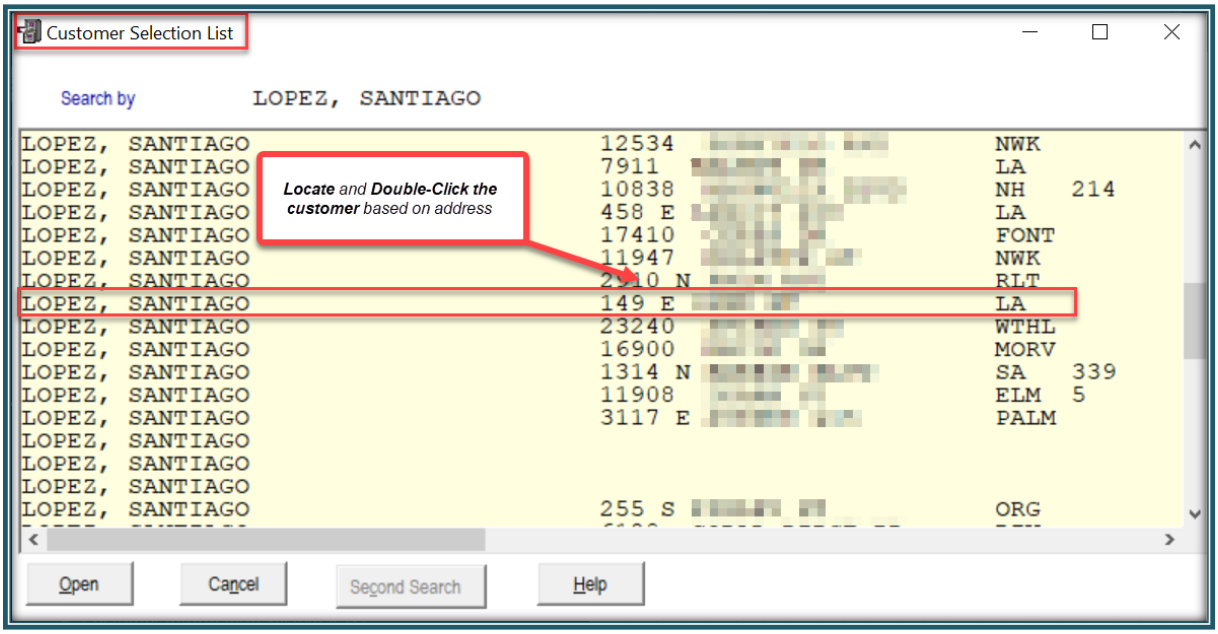


SEARCHING BY FIRST AND LAST NAME

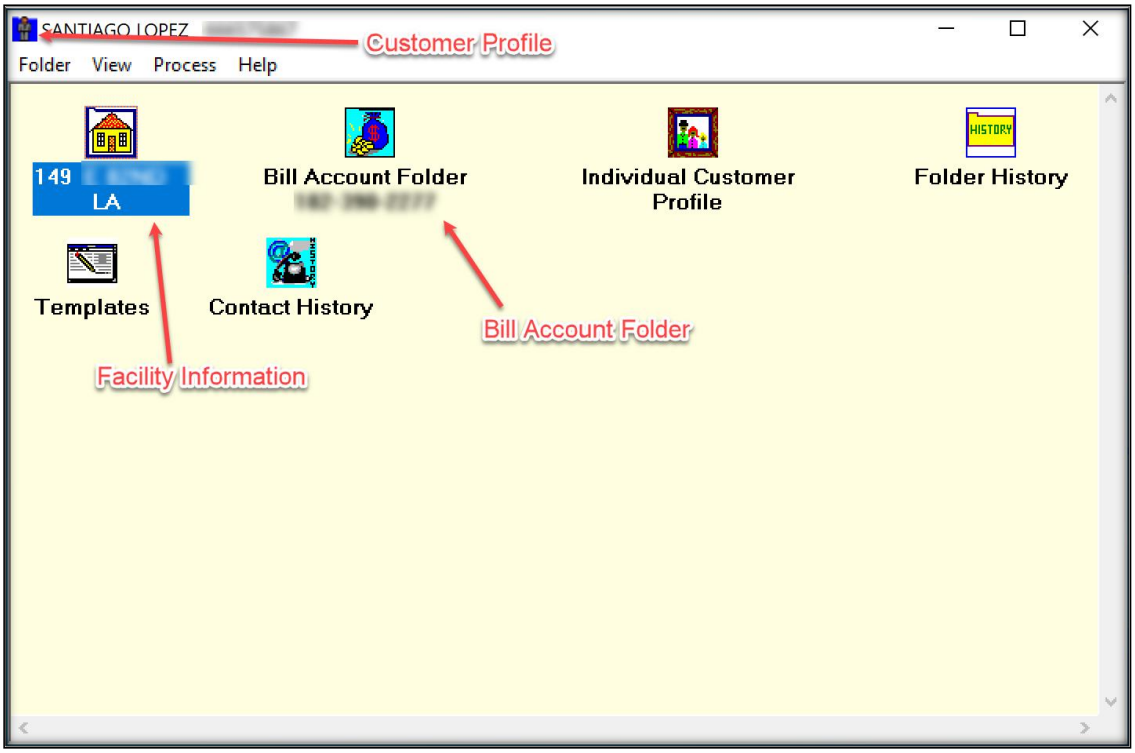


When searching by "First and Last Name" the processor will keep in mind that this is most effective when looking up actual customer name, **NOT** businesses. The processor will be directed to "Customer Selection List"

ONLY use this method if it's your only option.

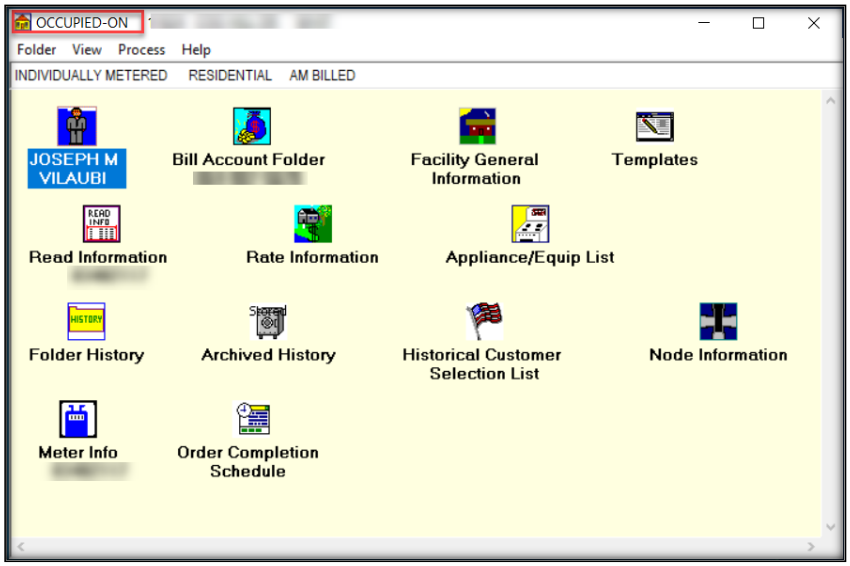


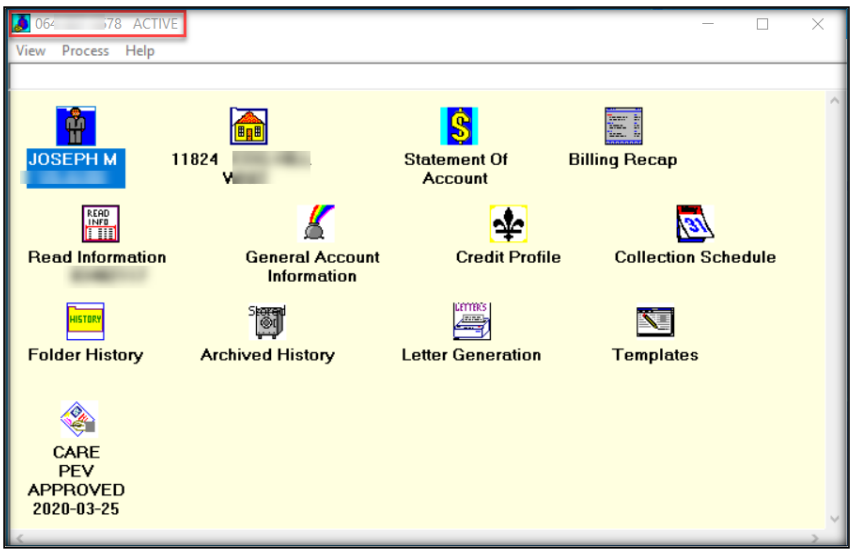
From here the customer can access the “Premise Information” and “Account information”



VERIFYING ACCOUNT STATUS

Processors will verify the Account Status in CIS to see if it is “Active” or “Occupied-On”. This will be used when an Account is not attached to an enrollment due to “No Account Match”. The processor will take the address provided by the customer and locate it in CIS. If you can locate the address, you will take the Account Number and add it in EECP. If the account is in EECP you will populate it in EECP, if the account is **NOT** in EECP, please reference On Hold – Account Not in EECP.



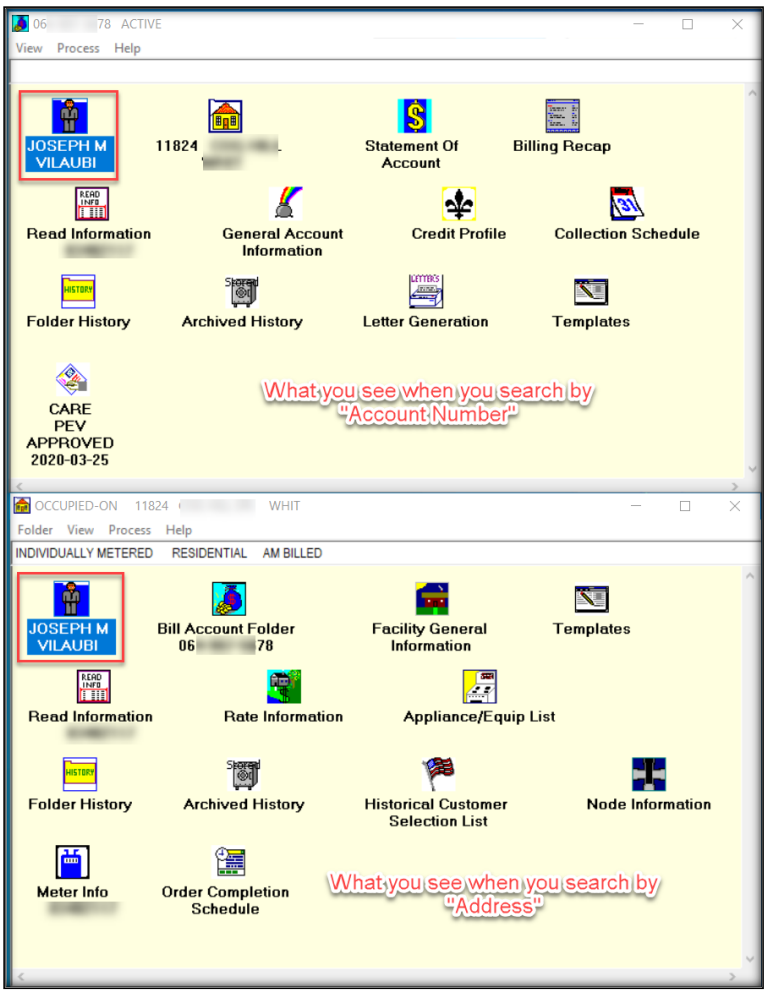


If the address is not serviced by SoCal Gas or you are unable to locate it in CIS, please cancel the enrollment and send the appropriate the DNQ email/letter.

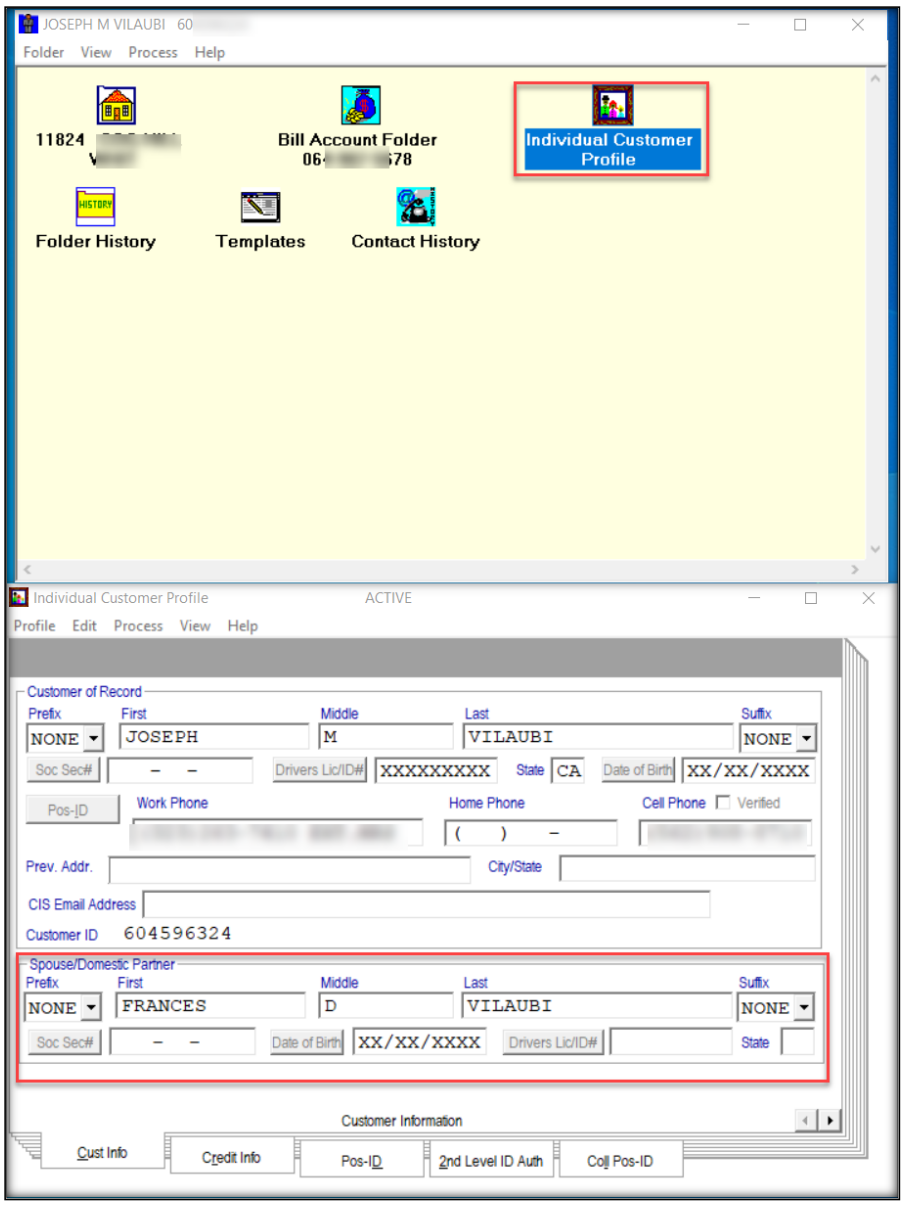
Individual Customer Profile

The "Individual Customer Profile" will be viewed when the Signee on the Mail in Application or Applicant for the Online and Mobile Application is not the Customer of Record. This will be done for verification reasons to check if the Applicant is authorized to apply for the rebate on the account.

To get to the "Individual Customer Profile" you will search using the "Account Number" or "Address" as shown above. Then you will navigate to the "Customer Profile".

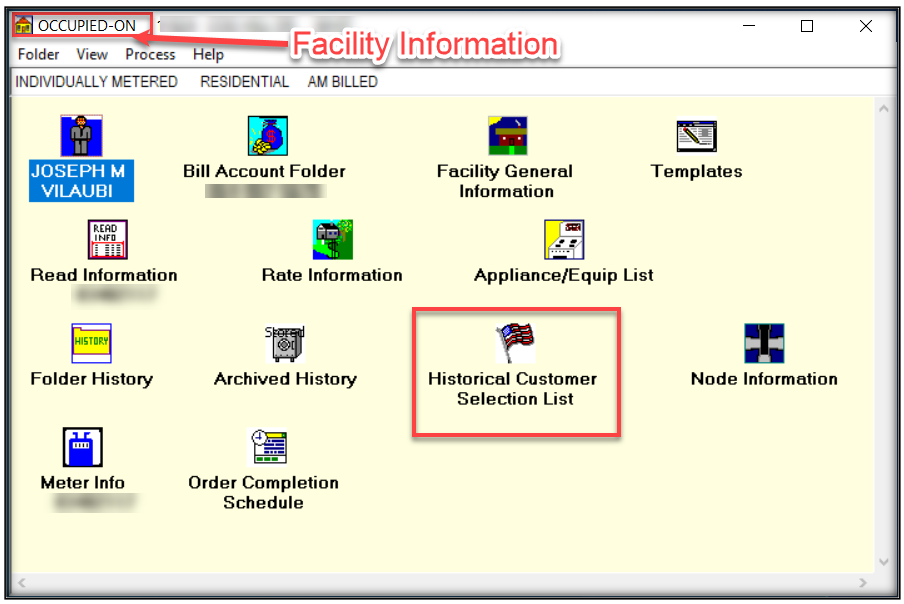


Once in the Customer Profile, click on “Individual Customer Profile”. Then you will see if the Applicant is listed under “Spouse/Domestic Partner”. If the Applicant is not listed on the account or you do not see a memo authorizing the applicant, please send the appropriate INC email/letter to have them reapply and provide necessary documentation.

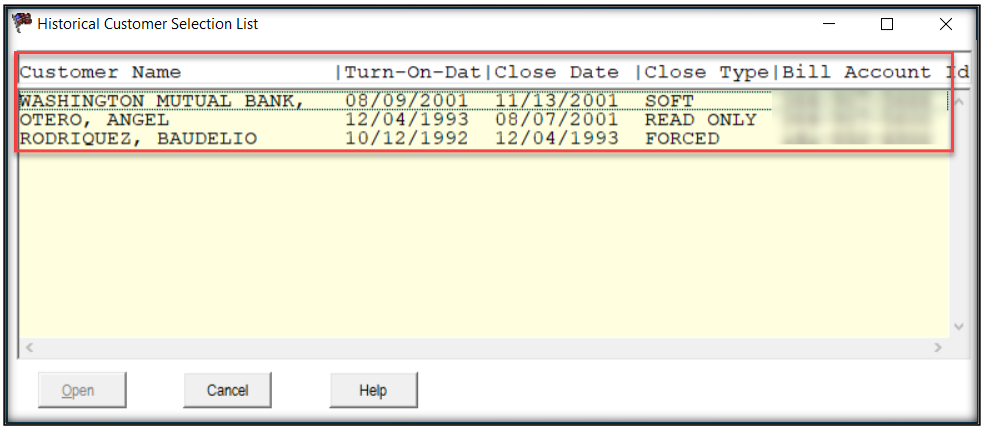


HISTORICAL CUSTOMER SELECTION LIST

The "Historical Customer Selection List" will be used to verify if the Applicant was a previous homeowner or account holder. The Historical Customer Selection List can be found by navigating to the "Premise Section".



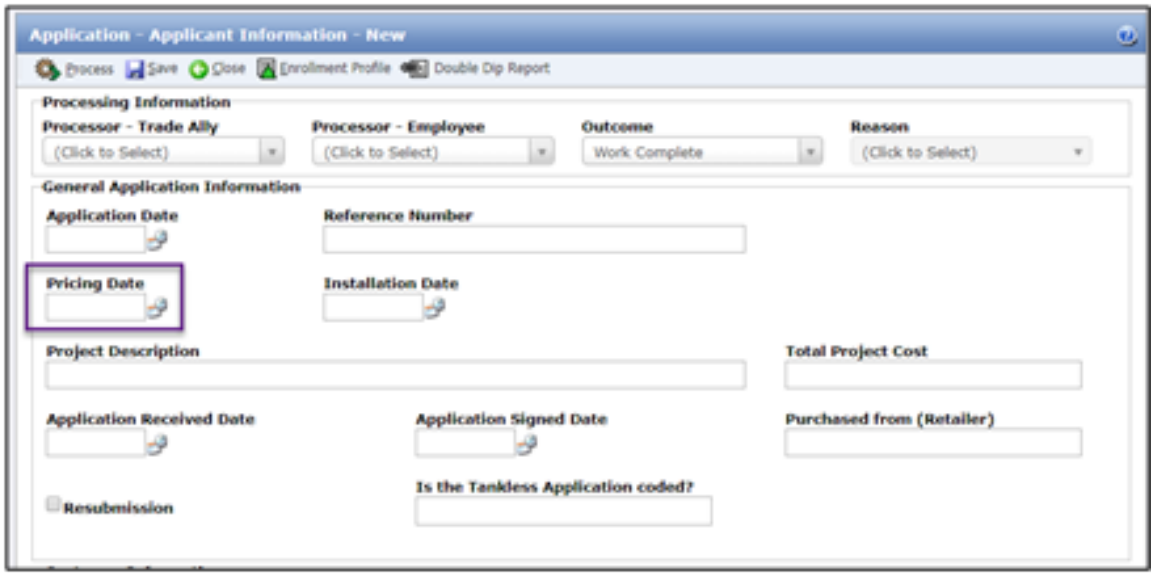
Once in the “Facility Information” the processor will click on “Historical Customer Selection List” and a list of all previous account holders can be seen.



The list above can be used to determine if the Applicant had previously been on the account.

PRICING DATE (2022 IO)

A new field "Pricing Date" has been added to various programs in EECP. The purpose of this field is to allow flexibility at year-end with charging projects to the next year's Internal Order (I/O) number. The date entered in this field will drive EECP's Pricing and Savings schedule for installed measures.



Programs will be configured to select Pricing and Savings Schedules based on the date entered in "Pricing Date" field.

Applications received within a Program Year that are not processed by the Enrollment Cutoff Date (February 15, 2022) and were not accrued or encumbered **MUST** be charged to the next year's I/O. **Please see next section on 2021 end of year applications using 2022 IO.**

If exception to the policy is required, please check with the appropriate management to obtain approval.

The following guidelines will be used **effective January 27th, 2022 – please use 2022 IO to pay as 2021 funds have been depleted:**

SCENARIO 1:

- **Application Received/Postmarked on or Before 12/31/2021**
- Purchased and Installed in 2021
- **Pricing Date = 1/1/2022 as 2021 IO funds have been depleted**

SCENARIO 2: DNQ – CUSTOMERS MUST INSTALL MEASURE BEFORE APPLYING – CUSTOMER WILL NEED TO REAPPLY ONCE MEASURE IS INSTALLED

- **Application Received/Postmarked on or Before 12/31/2021**
- Purchased 2021
- Installed 2022
- **Pricing Date = n/a (DNQ)**

SCENARIO 3:

- **Application Received/Postmarked between 01/01/2022-02/15/2022**
- Purchased and Installed 2021
- **Pricing Date = 01/01/2022 effective 01/27/2022 as 2021 funds depleted**
 - **For system completed mobiles, okay to leave 2022 application date as 2022 IO will be utilized.**
- **Incomplete applications: Please use the 03/15/2022 end of submission email date.**
 - Please note that these enrollments will need to be completely closed out by 03/31/2022 and that includes PM payment approval.

SCENARIO 4:

- **Application Received/Postmarked between 01/01/2022 – 02/15/2022**
- Purchased before 10/1/2021
- Installed 2022
- **Pricing Date = 01/01/2022**
 - For system completed mobiles, okay to leave 2022 application date as 2022 IO will be utilized
- **Incomplete applications: Please use the 03/15/2022 end of submission email date.**
 - Please note that these enrollments will need to be completely closed out by 03/31/2022 and that includes PM payment approval.

SCENARIO 5:

- **Application Received/Postmarked on or After 01/01/2022**
- Purchased between 10/1/2021 – 12/31/2021
- Installed 2021 – DNQ
- Installed 2022
- **Pricing Date = 1/1/2022**
 - For system completed mobiles, okay to leave 2022 application date as 2022 IO will be utilized
- **Incomplete applications: Please use the 02/15/2023 end of submission email date.**

SCENARIO 6:

- **Application Received/Postmarked after 2/15/2022**
- Purchased before 10/1/2021
- Installed 2021 – DNQ
- Installed 2022 – **see note below**
- **Pricing Date 1/1/2022**
- **Note: When reviewing documents, if proof of delayed delivery is seen, processor can proceed with asking for PM approval. If no proof of delayed delivery is seen, DNQ and send DNQ email. If customer disputes, ask for proof of delayed delivery and seek PM approval.**

SCENARIO 7:

- **Application Received/Postmarked on or After 01/01/2022**

- Purchased 2022
- Installed 2022
- **Pricing Date = Purchase Date**
- **Incomplete applications: Please use the 02/15/2023 end of submission email date.**

2022 Program Offerings

Pricing Schedule effective January 1, 2022

REEP and REEP Mobile				
Measure	Programs	EECP Measure Code	Program Builder Measure Code	Incentive
Customer Admin Fee	Both	CMFee01	N/A	Manual Entry
Customer Satisfaction Fee	Both	CSAT	N/A	Manual Entry
Efficient Residential Gas Oven	Both	541304	541304	$100.00
Energy Star Dryer	Both	540355	540355	$70.00
Natural Gas Fireplace Insert- Tier 1 (NR) - (70-74.9 FE)	Both	2019FI	540841	$300.00
Natural Gas Fireplace Insert- Tier 2 (NR) - (75 FE or greater)	Both	2019FI	540842	$500.00
High Efficiency Furnace, Residential, AFUE 92%-VSM,SFm	3702	541070	541070	$115.00
High Efficiency Furnace, Residential, AFUE 95%-VSM	3702	541055	541055	$325.00
High Efficiency Furnace, Residential, AFUE 97%-VSM,SFm	3702	541061	541061	$1,000.00
Incentive Adjustment/Correction	Both	541324	541324	Manual Entry
Incentive Kicker	Both	541599	541599	Manual Entry
Pool & Spa Heaters in Res Bldgs - 84% TE	Both	2019PH	540453	$400.00
Pool & Spa Heaters in Res Bldgs - 90% TE	Both	2019PH	540454	$750.00
Storage Water Heater 40 Gal Medium Draw (UEF>= 0.64)	Both	2019SWH	540710	$115.00
Natural Gas Storage Water Heater (UEF>= 0.68 high draw)	Both	2019SWH	540712	$115.00
Small Tankless Water Heater, Tier 3 (UEF>=0.95), Medium Draw	Both	2019TWH	541177	$1,000.00
Small Tankless Water Heater, Tier 2 (UEF>=0.87),Medium Draw	Both	2019TWH	540714	$800.00
Small Tankless Water Heater, Tier 1 (UEF=0.82-0.86), Medium Draw	Both	2019TWH	541436	$600.00
Therm Kit Request	3702	THMKTRQ	N/A	None
Solar Thermal Water Heating System with Storage Backup, replacing storage water heater	3702	541694	541694	$3,500.00
Solar Thermal Water Heating System with Tankless Backup, replacing storage water heater	3702	541695	541695	$4,500.00
Solar Thermal Water Heating System with Tankless Backup, replacing tankless water heater	3702	541696	541696	$4,500.00

Double Dip (DD)

What is a Double Dip?

A customer's application is said to have a **Double Dip** when the customer has already received a rebate for the same measure, under the same account, within 5 years *(internal use **ONLY**, not to be stated to the customer)*. This is not limited to measures received as part of the **Residential Energy Efficiency Program** but through other rebate programs as well.

The **Double Dip** period for **EE Therm Kits** is **3** Years**.**

There are times when customers apply for a rebate however the exact 5 years have not passed. It is okay to proceed with the application as you can go by the **year of submission** and not the exact date.

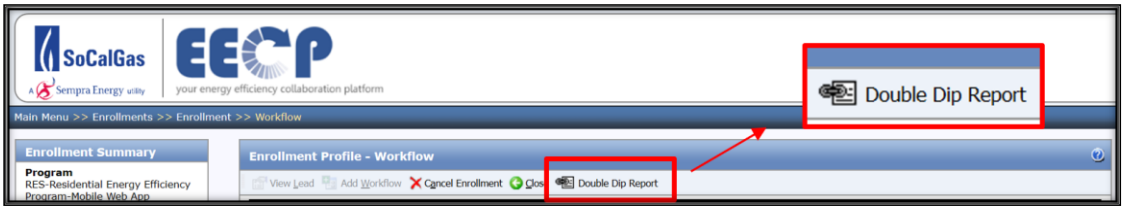
*****Note: Customers who have received a rebate for a measure under one account and name, are still eligible for a rebate for the same measure if the account number and name is different.**

CHECKING THE DOUBLE DIP REPORT

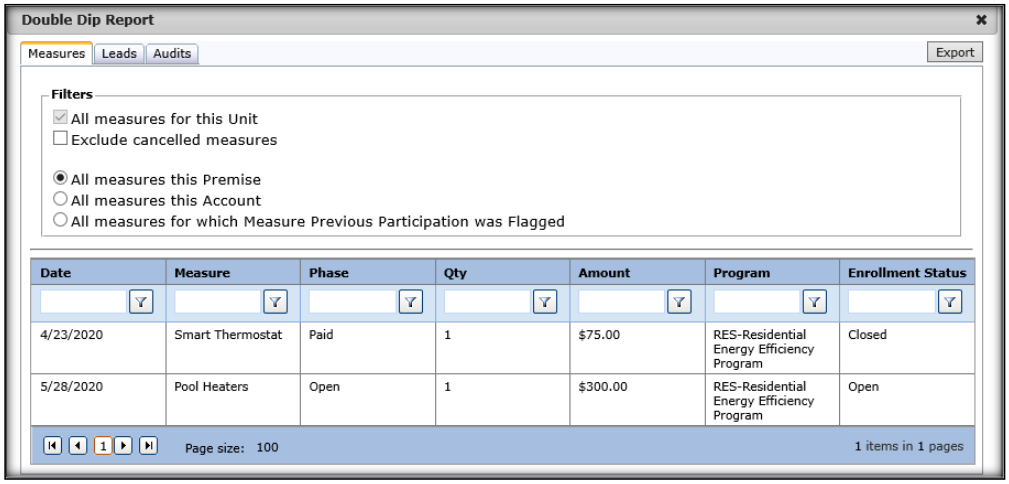
To ensure there are no **Double Dips,** processors **MUST** verify there are no **leads** for the same measures, within the last 5 years, under the same account. A **lead** in the **Double Dip Report** is an indication of previous participation or of a current pending enrollment for the same property address. If there are leads for the same measure within the last 5 years, additional steps MUST be taken to determine the customer's eligibility.

To check for **Double Dips**, do the following:

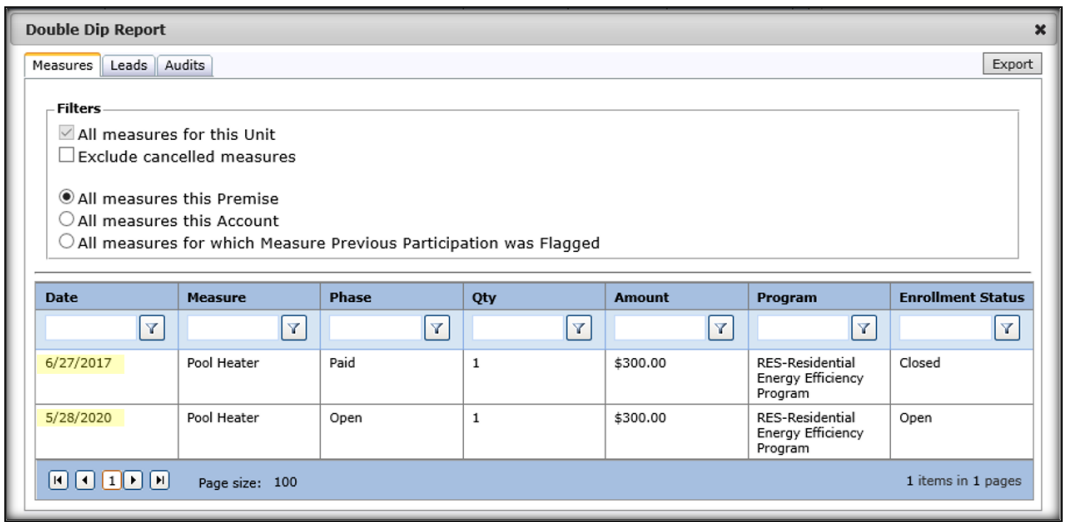
1. Click on the **Double Dip Report** located at the top of the **enrollment** workflow:



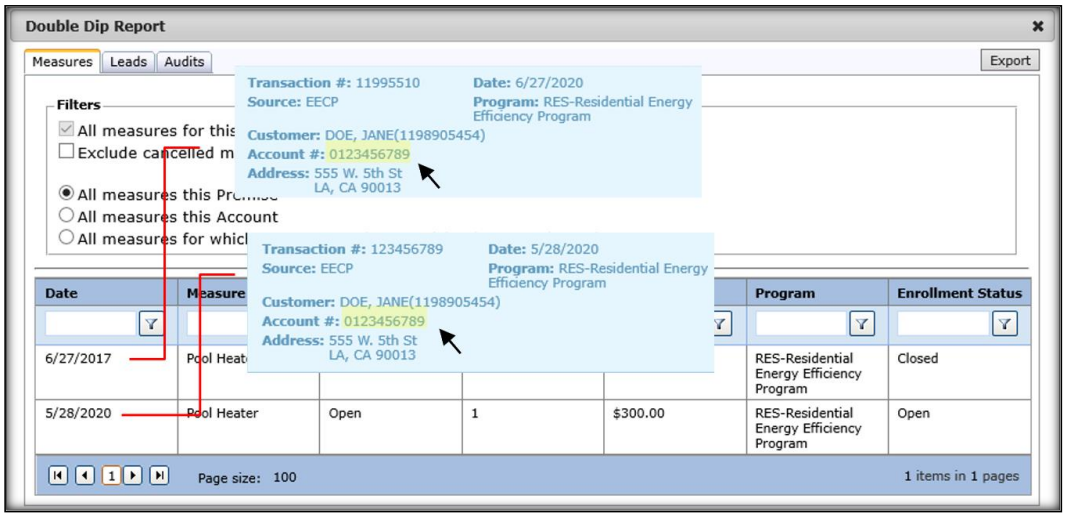
2. Verify if there are any leads within the last 5 Years.
 - Below is an example of a **Double Dip Report** for a Pool Heater Application. Notice, there are no leads within the last 5 years for a Pool Heater (other than the lead for the current application). Hence, the application has no **Double Dips** and can be processed.



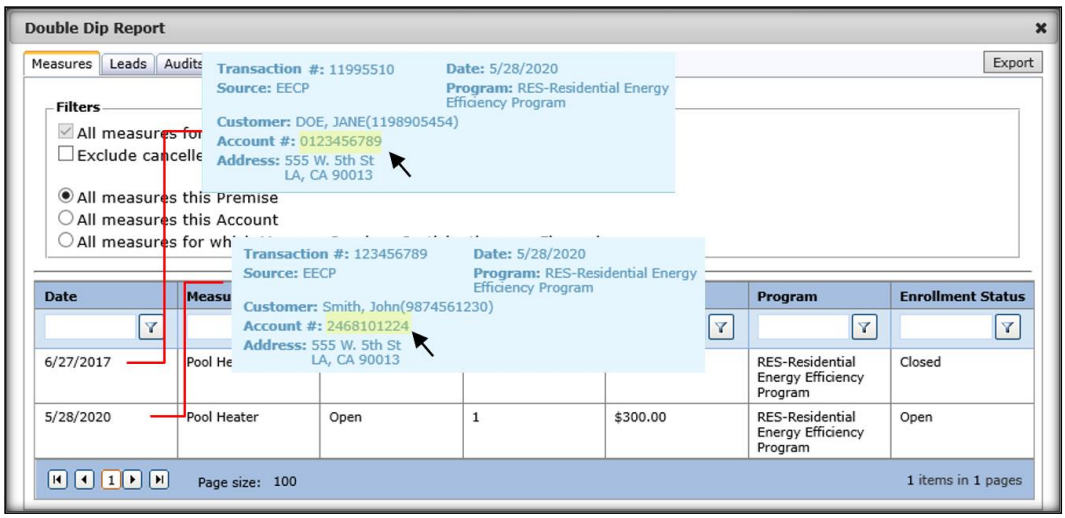
 - Below is an example of a **Double Dip Report**, where there are two leads for the same measure within 5 years of one another. This is a **Double Dip.** Proceed to Step 3.



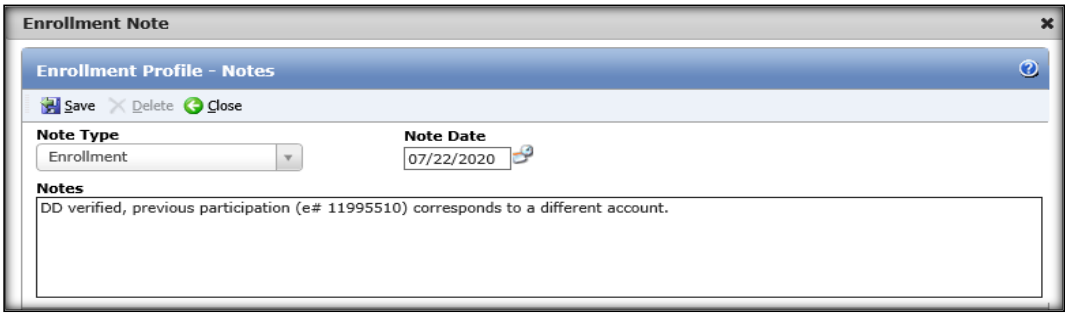
3. If there is a **lead** for the same measure, the processor will check the **account number** for each lead. To easily view this information, hover the mouse cursor over each lead:
 - Below is an example showing the same account for each lead. This is a **Double Dip**. Proceed to the **Reference Table** to verify if the program combination requires the enrollment to be disqualified.



 - Below is an example showing two **DIFFERENT** accounts for the same measure. This is **NOT** a **Double Dip** and can be processed.



- A note in the **Notes** workflow will be made indicating the **Double Dip** has been reviewed:



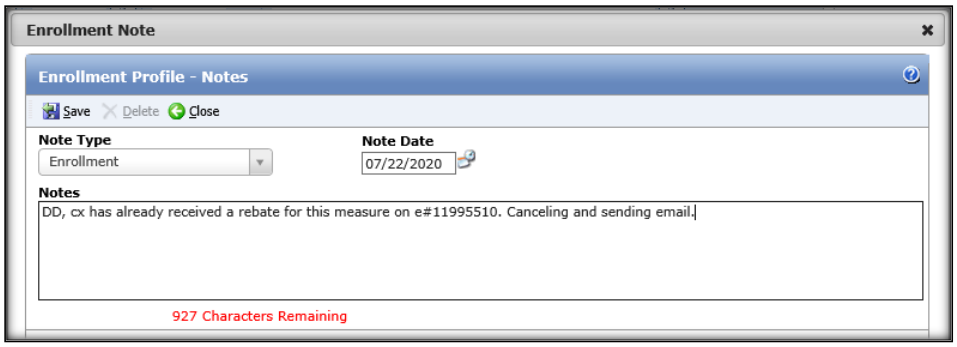
REFERENCE TABLE

Even though the customer's application may have a **Double Dip**, this does not necessarily mean the enrollment MUST be **disqualified**.

Reference the table below to determine **Double Dipping** between the **Residential Energy Efficiency Program (REEP)** and other programs. If you have encounter other program combinations, please reach out to your Team Lead. For reference on past programs, please see Double Dip table in the Appendix.

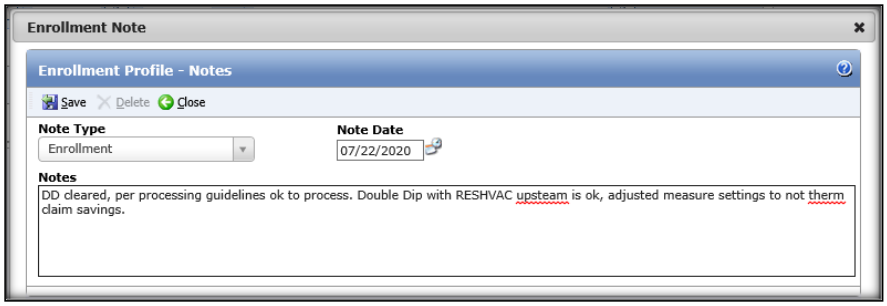
Program 1	Program 2	Double Dip?	Payment
REEP	REEP	Yes	First come first served. Pay only one.
REEP	REEP (Solar)	No	For Solar WH rebates ONLY, this is not a DD
REEP	RES-Community Language Efficiency Outreach-Direct Install (CLEO)	Yes	First come first served. Pay only one.
REEP	ACE Program	Yes	First come first served. Pay only one.
REEP	Marketplace	Yes	First come first served. Pay only one.

* If the **lead** combination has been verified as a **Double Dip**, the application will be cancelled, and the processor will make the corresponding note in the **Notes** workflow:



And the corresponding email will be sent to the customer

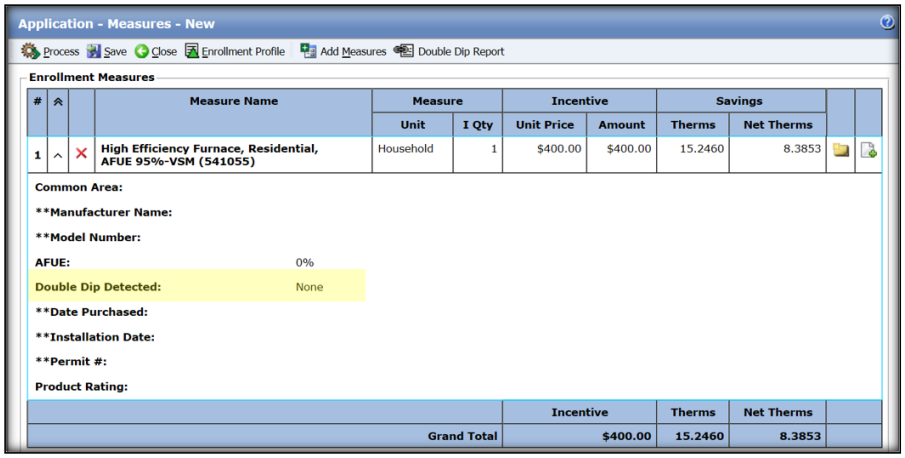
* If the **lead** combination is **NOT** a **Double Dip**, proceed to process the application and make a note in the **Notes** workflow, indicating the **Double Dip** has been cleared:



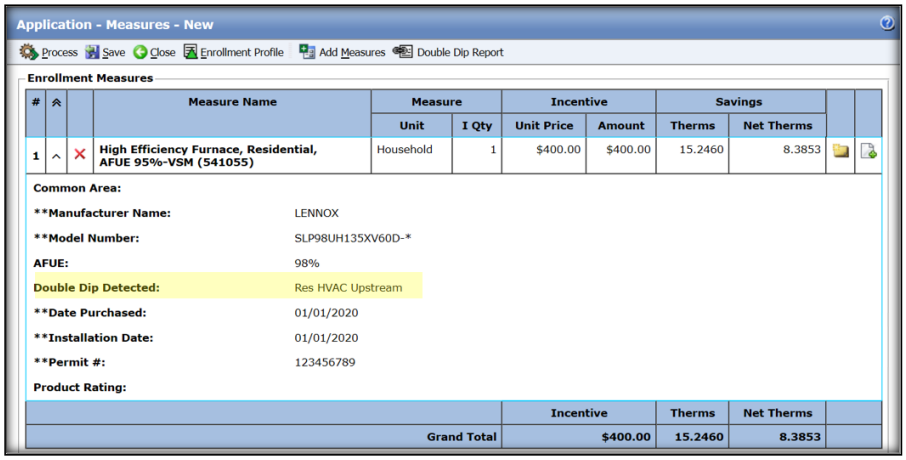
RES HVAC UPSTREAM DOUBLE DIP DETECTION

If **Double Dip** is detected for the Res HVAC Upstream, the Energy Efficiency Rebate Program will fulfill the enrollment and will claim savings. See below for processing procedures:

1. Scenario 1: No DD detection
 1.1. Processor will select "None" in the **Double Dip Detected Field** (Notice Savings are captured)



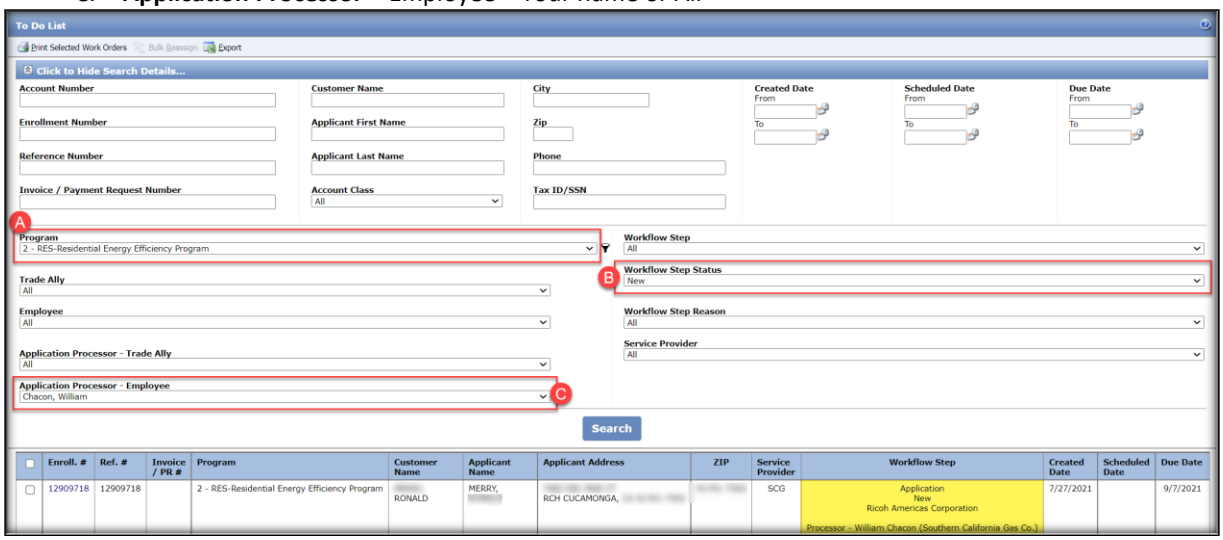
2. Scenario 2: Double Dip Detected
 2.1. Processor will select "Res HVAC Upstream" in the **Double Dip Detected Field**



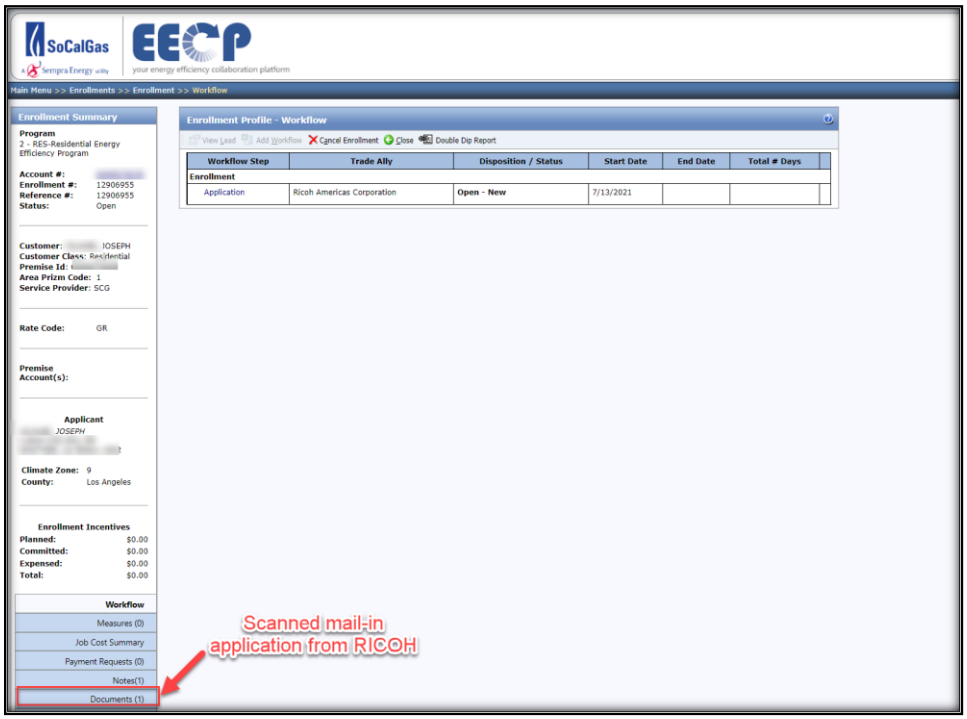
MAIL IN APPLICATION

The below is a step-by-step process on how to process a Mail in Application.

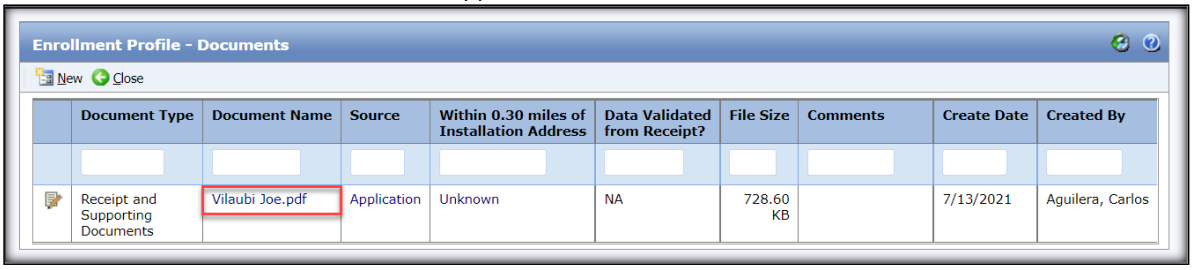
1. Ricoh will scan mail in applications and create enrollment. Enrollments can be found by navigating your To Do List.
 A. **Program** = 2 – RES-Residential Energy Efficiency Program
 B. **Workflow Step Status** = New
 C. **Application Processor** – Employee = Your name or All



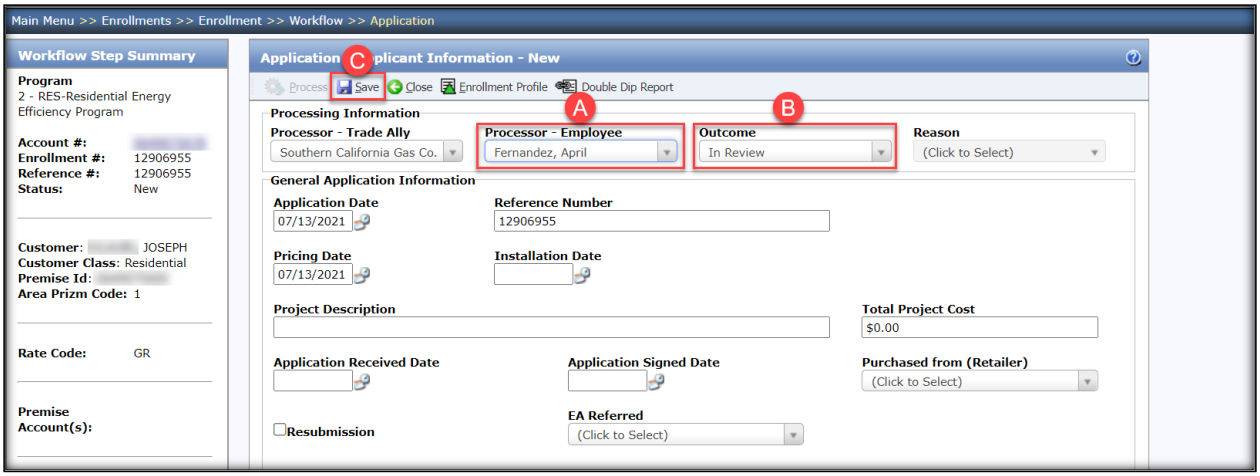
2. When enrollment hyperlink is clicked from the "To Do List", the user will be re-directed to the enrollment. Ricoh has scanned and attached the application into the documents sub menu section of the enrollment.



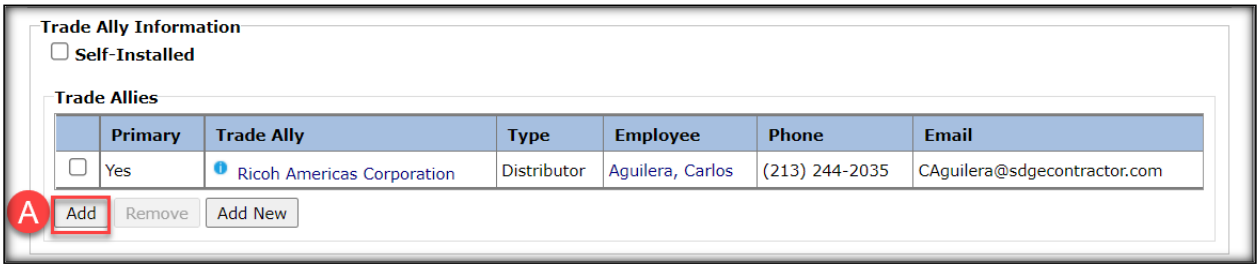
3. Click on the **Document folder** and you will be redirected to the image below. Click on the PDF Document Name to download the RICOH scanned application.

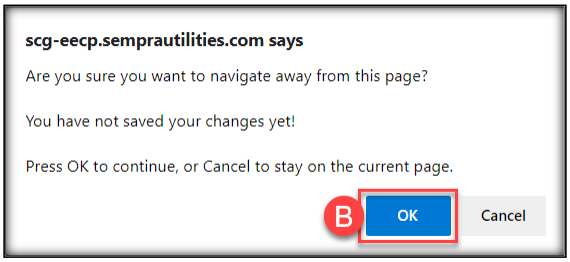


4. Go back to the **Enrollment Application Workflow**. Ensure the following is done:
 A. **Processor – Employee** = Your name
 B. **Outcome** = In Review (this will gray out the process button and prevent you from processing prematurely)
 C. **Click on "Save"**



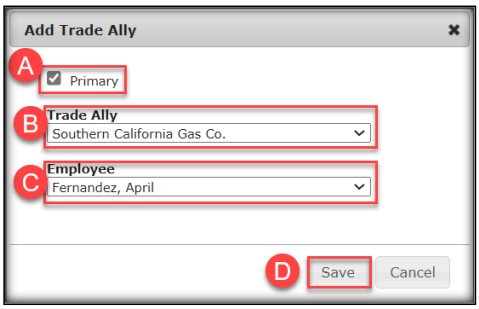
5. Scroll down to the **"Trade Ally Information"** section.
 A. Select **"Add"** to add your name in the Trade Ally Information and an alert will popup.
 B. Click on the **"OK"** button



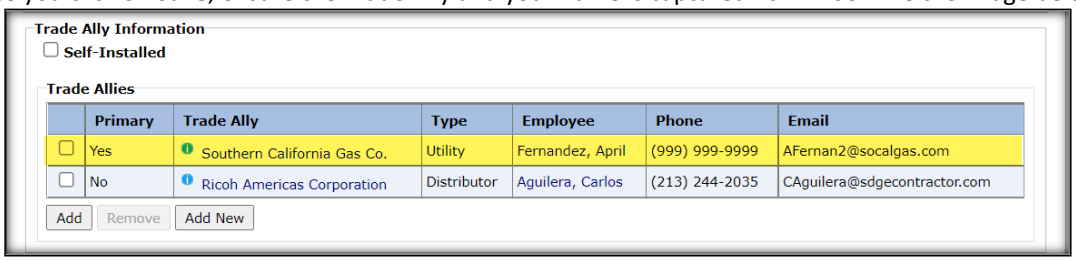


6. Once you see the window, do the following:

A. **Primary** = Click on the box
B. **Trade Ally** = Select Southern California Gas Co. from dropdown
C. **Employee** = Select Your Name from dropdown
D. **Click on "Save"**



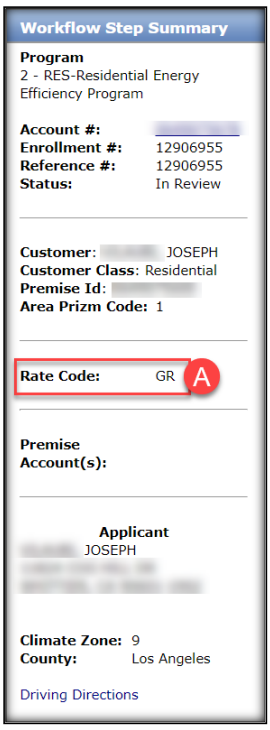
7. Once you click on **Save**, ensure the Trade Ally and your name is captured. It will look like the image below:



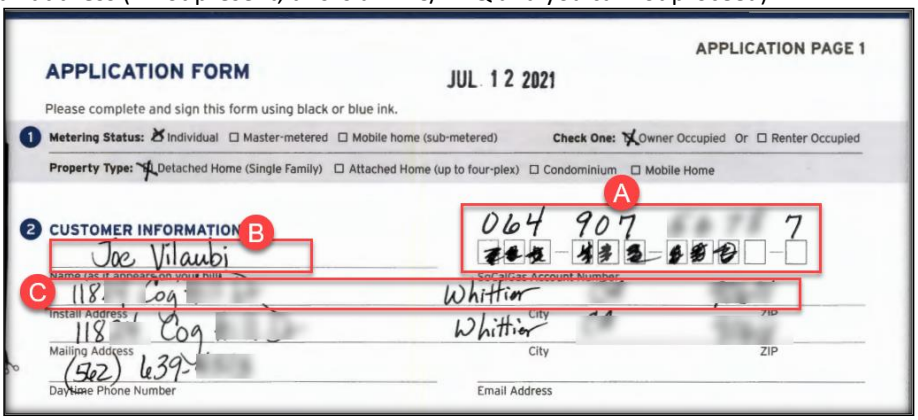
VERIFYING THE ACCOUNT AND DOCUMENTS

8. Next verify the customers Rate Code on the left under the Workflow Step Summary.
 A. Make sure it has the one of the following: GR, GR1, GRC, and GT-R, if the customer does not qualify, processor will DNQ the enrollment and send a letter/email to customer. *Please reference the Manually Generated Emails/Letters section in the Appendix.

For any other rate codes please refer to the Rate Code section above.



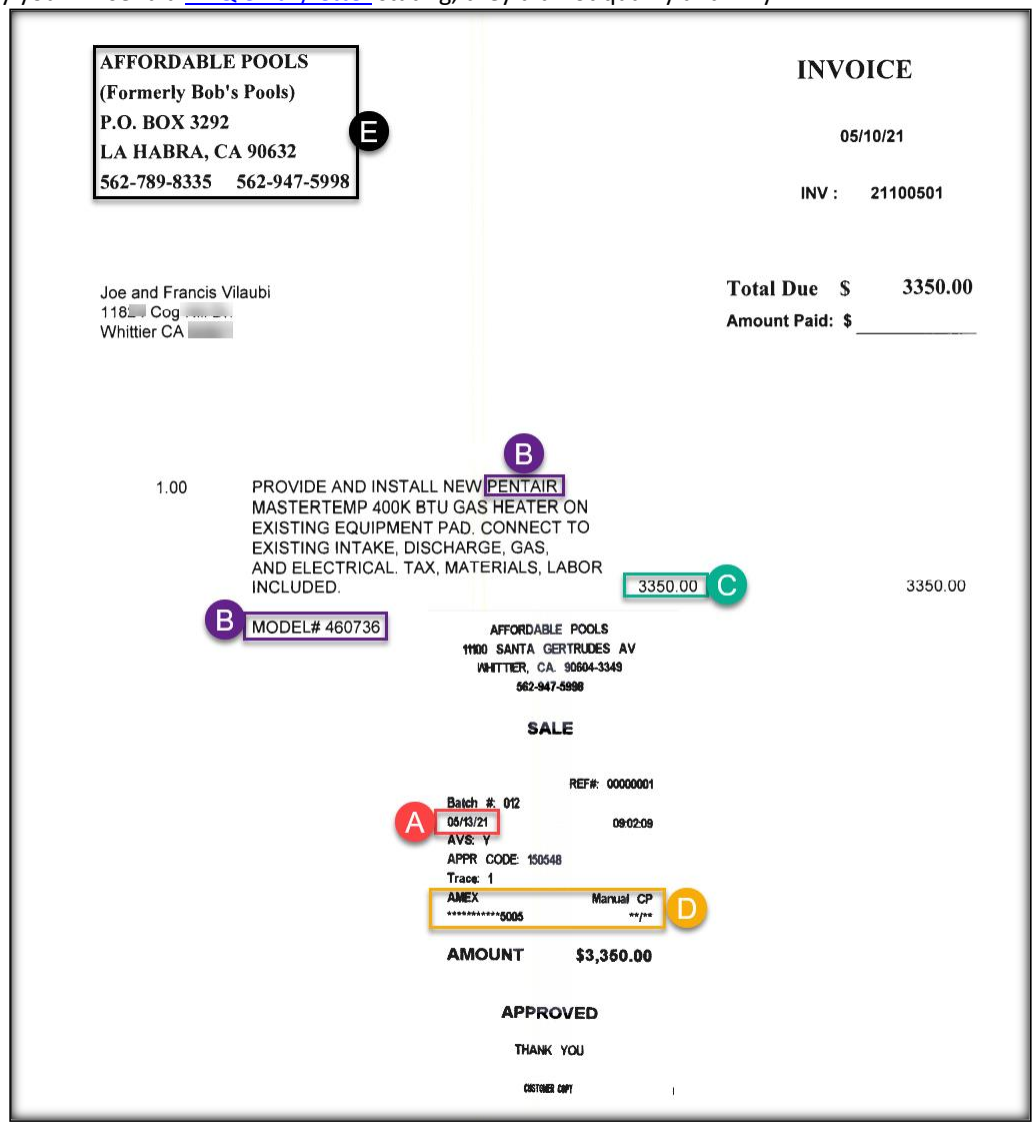
9. RICOH enters the account number for the enrollment in EECP when the application is created based off the mail in application. The processor needs to make sure the following matches between what is in EECP and what the customer sent in:
 A. **Account number** (If not present it is okay to proceed if we have the install address or a copy of the bill.)
 B. **Customer's name** (If not present, this is an INC/DNQ and you cannot proceed unless you have the gas bill.)
 C. **Install address** (If not present, this is an INC/DNQ and you cannot proceed)



10. Next verify the measure's make/model specifications qualify for the incentive by locating their invoice/receipt. The invoice **MUST** have the following to proceed with the enrollment.
 A. Purchase date
 B. Model number
 C. Price of equipment or total price (there needs to be at least one)
 D. Method of payment
 E. Retailer/vendor information
 - If receipt is from Retailer, Retailer name only is sufficient

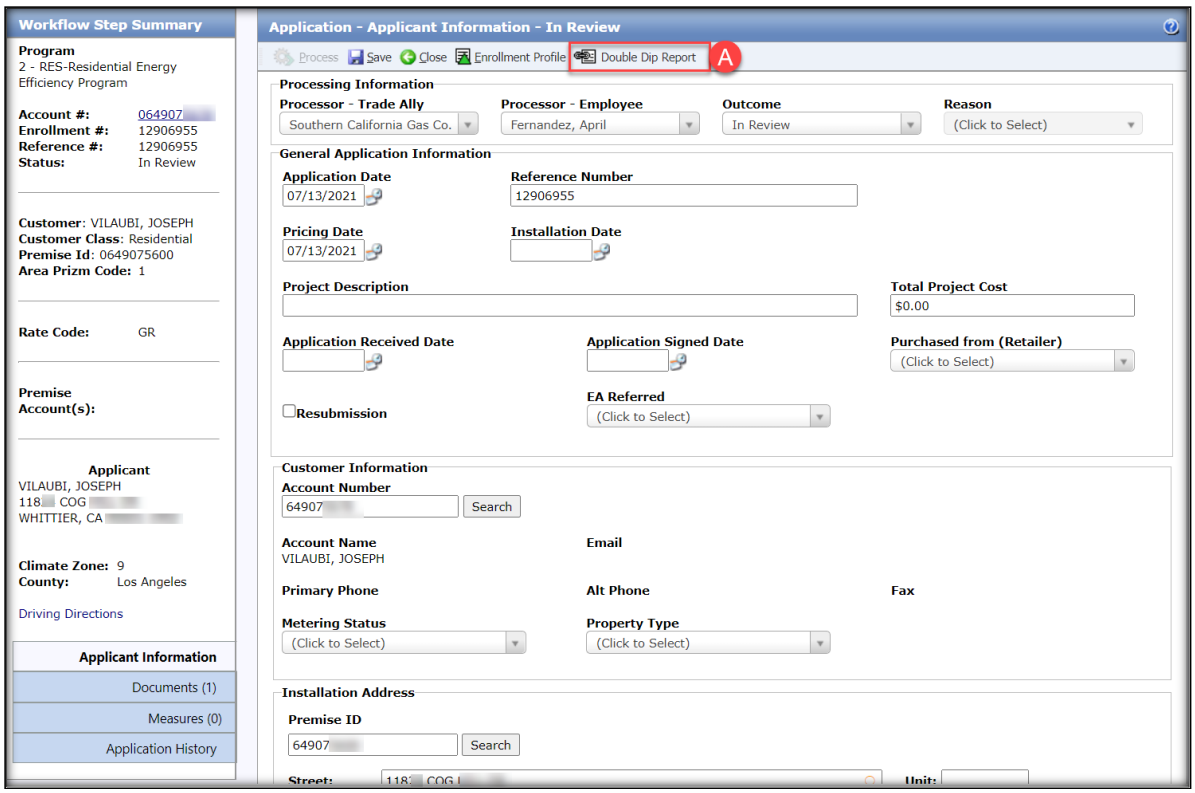
- If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:
 - Contractor name and phone number
 - Contractor name and address
 - Contractor name and email

If anything from above is missing you will send an INC email/letter allowing them to reapply or if the measure does not qualify you will send a DNQ email/letter stating, they did not qualify and why.

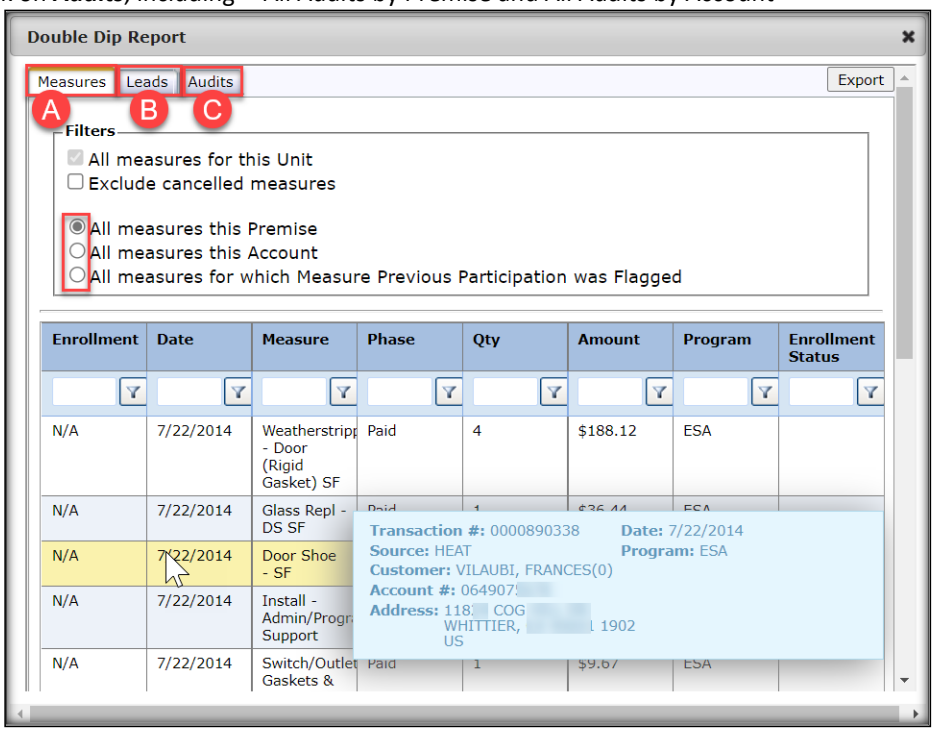


Once you have verified their equipment qualifies for the rebate and you have the 5 items above you can proceed with the application.

11. **ALWAYS** verify the Double Dip to ensure we are not paying the customer for something they already received a rebate for within the past 5 years. For more information on Double Dip, please reference it above. **IMPORTANT: There are times when customers apply for a rebate, however the exact 5 years have not passed. It is okay to proceed with the application as you can go by the year of submission and not the exact date.
 A. Click on **Double Dip**

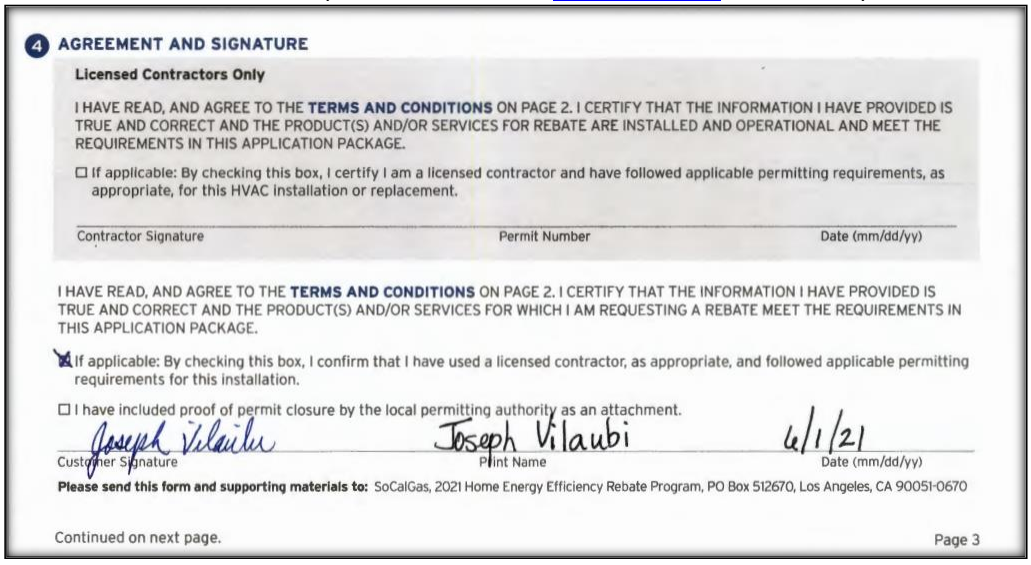


12. Once you have clicked on the Double Dip, do the following:
 A. Click on **Measures**, including "All measures this Premise, All measures this Account, and All measures for which Measure Previous Participation was Flagged"
 B. Click on **Leads**, including "All Leads by Premise and All Leads by Account"
 C. Click on **Audits**, including ""All Audits by Premise and All Audits by Account"



When you have verified the customer has no previous DD for the same measure, you can continue to review what the customer has entered in EECP.

13. The next mandatory field needed to proceed with the enrollment is the Signature in Section 4-Agreement and Signature on Application Page 1. Make sure the customer has signed the Application and if no signature is displayed an INC e-mail/letter will need to be sent and the enrollment placed "On Hold – Application Missing Signature"
 - For applications that have a typed signature and with a payee other than account holder, place the enrollment on hold for missing signature and use the appropriate INC Email to send the account holder the link to "electronically sign". If an email address is not available, then we would mail the account holder a paper application to sign and return.
 - The customer **MUST** provide an updated application with signature or may re-submit their application using the online application edit link provided in their incomplete letter.
 - ❖ Electronic signature is acceptable as they accept the Terms and Conditions and re-submit their online application.
 - If the signature does not match account holder name, please check CIS for spouse or Customer Service Agreement (CSA). Reference Individual Customer Profile for more assistance. **[Nexant will place on Team Lead Review**
 - ❖ If the signer is not on the account, please send the appropriate INC email/letter and cancel the application so the customer can reapply.
 - If they are the owners, they will need to provide proof of ownership. Reference FAQ for examples.
 - For **Natural Gas Furnaces,** please reference the furnace section for other requirements.



4 AGREEMENT AND SIGNATURE

Licensed Contractors Only

I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR REBATE ARE INSTALLED AND OPERATIONAL AND MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

☐ If applicable: By checking this box, I certify I am a licensed contractor and have followed applicable permitting requirements, as appropriate, for this HVAC installation or replacement.

Contractor Signature | Permit Number | Date (mm/dd/yy)

I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR WHICH I AM REQUESTING A REBATE MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

☒ If applicable: By checking this box, I confirm that I have used a licensed contractor, as appropriate, and followed applicable permitting requirements for this installation.

☐ I have included proof of permit closure by the local permitting authority as an attachment.

Joseph Vilaubi | Joseph Vilaubi | 6/1/21

Customer Signature | Print Name | Date (mm/dd/yy)

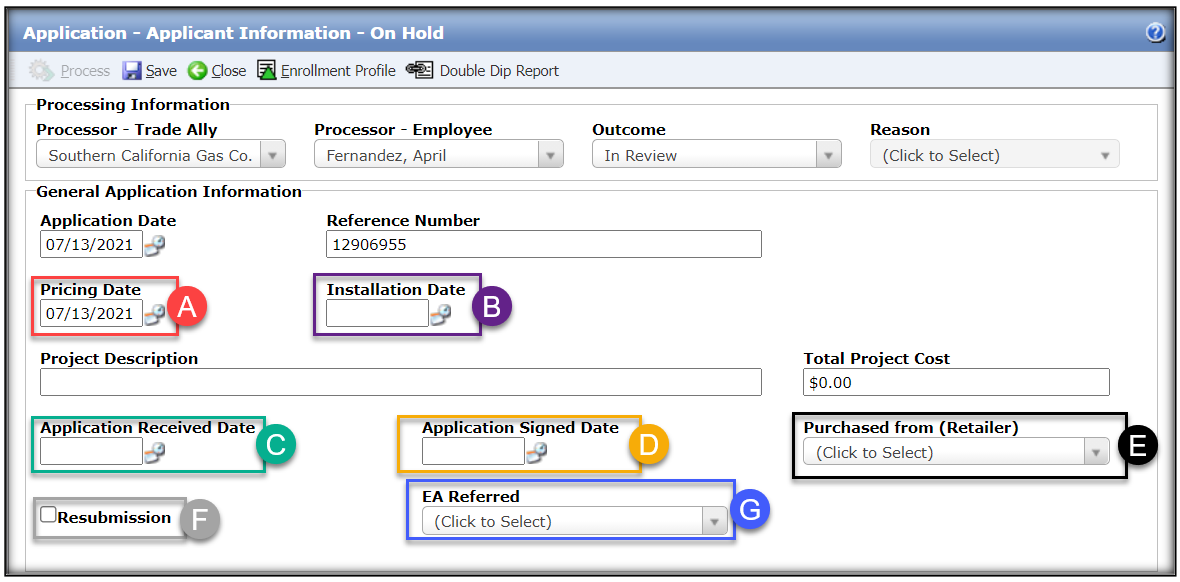
Please send this form and supporting materials to: SoCalGas, 2021 Home Energy Efficiency Rebate Program, PO Box 512670, Los Angeles, CA 90051-0670

Continued on next page. Page 3

For the next steps, all information will be taken from what the customer has entered in their mail in application as well as their receipt/invoice.

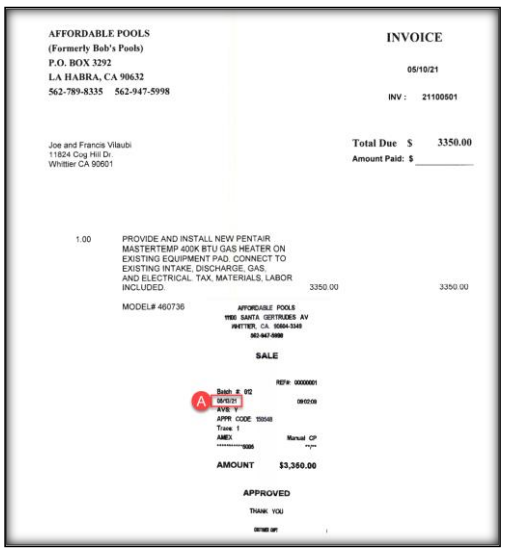
PROCESSING INFORMATION SECTION

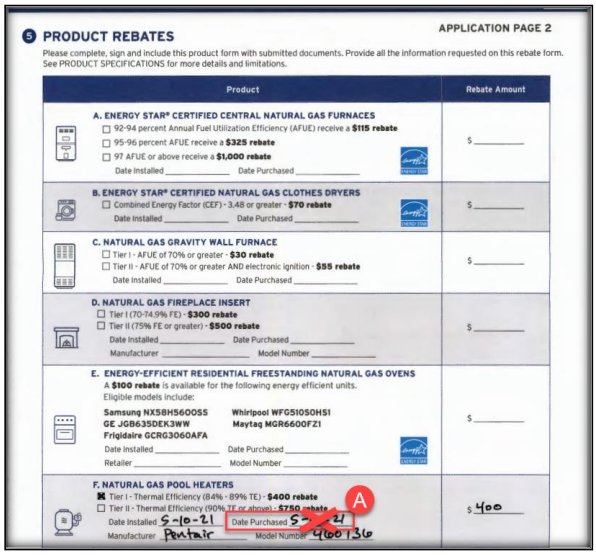
The fields below are what you will need to fill out if applicable:





14. Fields A-E and H are **MANDATORY**, and F-G are only if it applies. Fill out the following fields:
 A. **Pricing Date** = Purchase date taken from receipt/invoice **NOT** mail in application ****Unless otherwise directed by Team Lead due to IO Year. See Pricing Date Section for more information.**
 - If purchased from a retailer such as Best Buy, Home Depot, etc. The purchase date will be the date on the receipt provided to the customer at the time of checkout.
 - If purchased from a store which provides invoices, the purchase date will be the PAID IN FULL, PAID, PAID BY CHECK date. If this information is not provided, then the actual INVOICE DATE will take place as the purchase date.
 - Purchase date shall not be verified verbally by phone or through email; updated invoice documentation is always required.
 - If **NO** purchase date is on the invoice this is an INC and the customer will be asked to reapply in system email/letter.

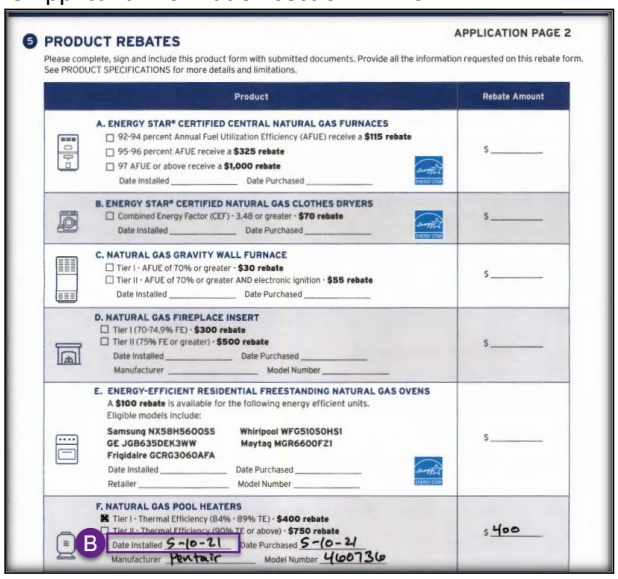




 B. **Installation Date** = Enter what was written from "Application Page 2"

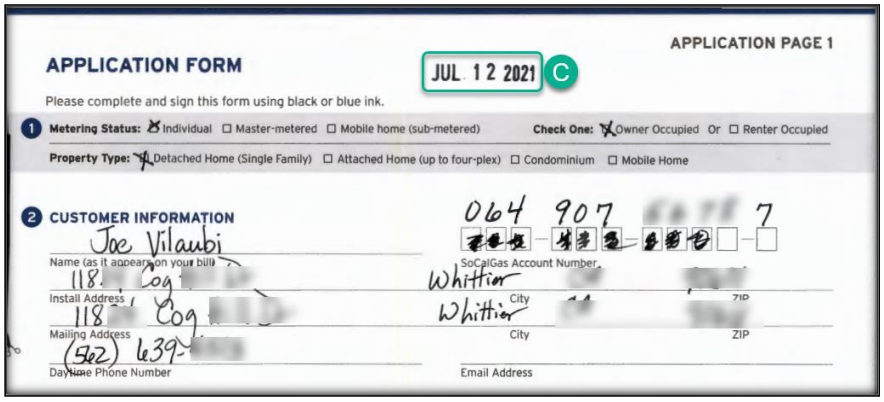
- If installation date is not provided on the application, but an official install date is provided ON THE INVOICE, then this date can be used as the install date.
 i. If invoice is from contractor, invoice date can be used as the install date.
 ii. If invoice is from retailer and no install date is seen, receipt date can be entered, but enrollment should be sent to inspection.

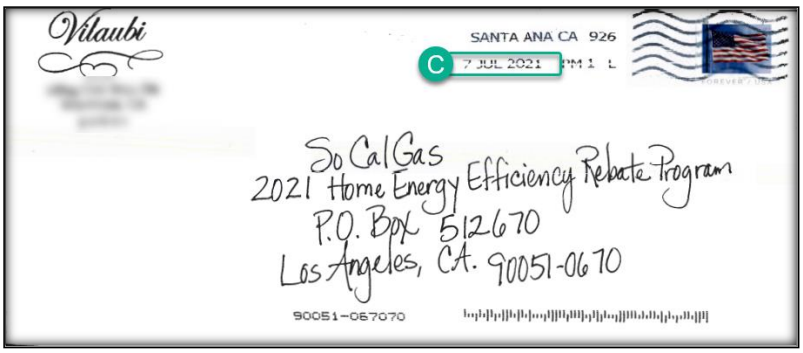
 *****A note in EECP is required on how the installation date was obtained IF date is not on the application as well as why it is being sent to inspection.**
- If a customer purchased multiple measures (in the same receipt), but only applied for some of them, then the processor can use the same install date for the other measures on the SAME receipt and process them along with the rest of the application.
- If a customer is applying for multiple eligible measures, record the earliest install date on the install date field in the Applicant Information section in EECP.



C. **Application Received Date** = Stamp date at the top of the application
- If no stamp date, take the postmark date.
- If no postmark date, take the signature date.
- If no signature date, take the date of installation.

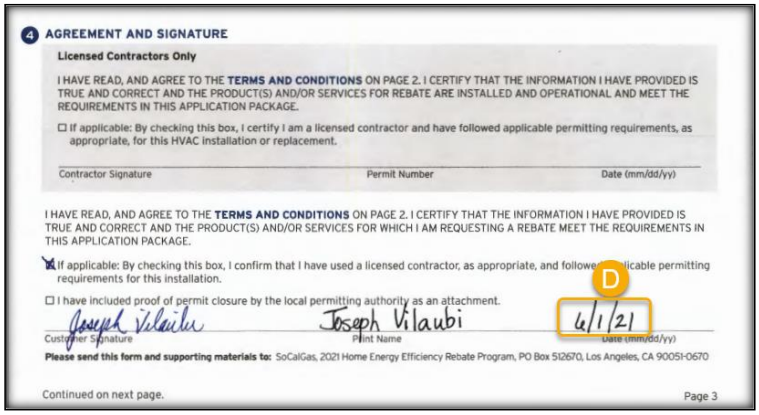
 *****A note in EECP is required on how the received date was obtained IF stamp date was not used.**





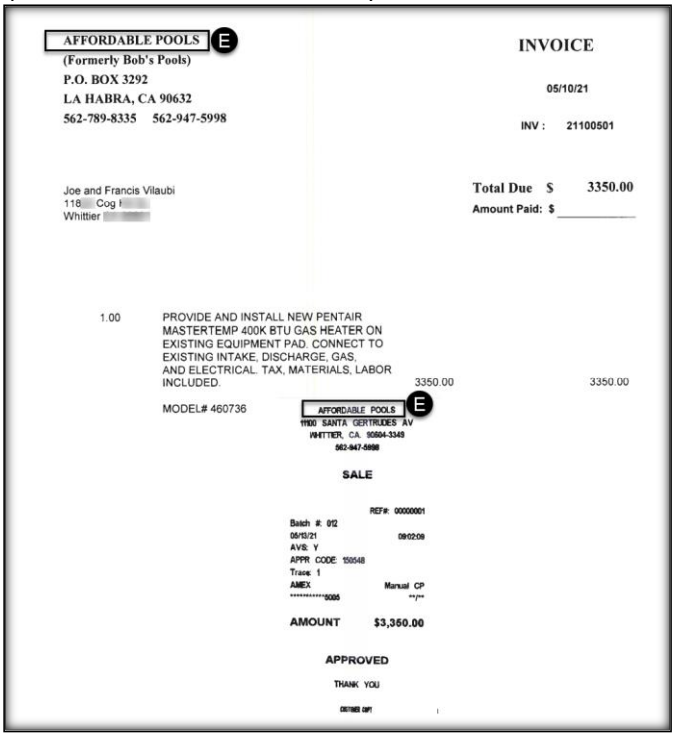
D. **Application Signed Date** = Enter the date next to the signature Application Page 1

- If no sign date, enter the postmark date as seen in C above.
- If no postmark date, enter the installation date as seen in B above.
 *****A note in EECP is required on how the application signed date was obtained IF date on signature line was not used.**



E. **Purchased from (Retailer)** – Enter the retailer from the invoice/receipt

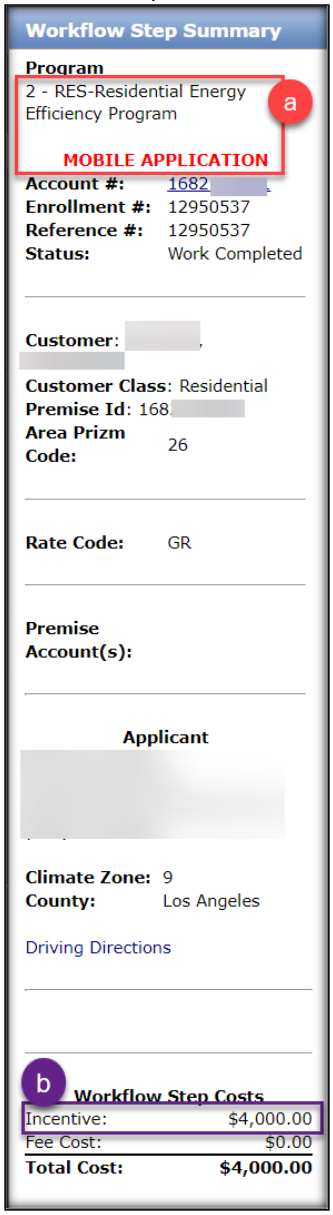
- If not in dropdown, use “Other” and manually enter it



F. If applicable: Resubmission = Will be checked only when a customer is reapplying for the same measure, they were INC or DNQ for.
G. If applicable: EA Referred = Not something we use right now
H. **IMPORTANT:** If the application is **NOT** for a solar thermal water heater measure, you **MUST** select **NO** for "Solar Thermal Water Heating Participant?"

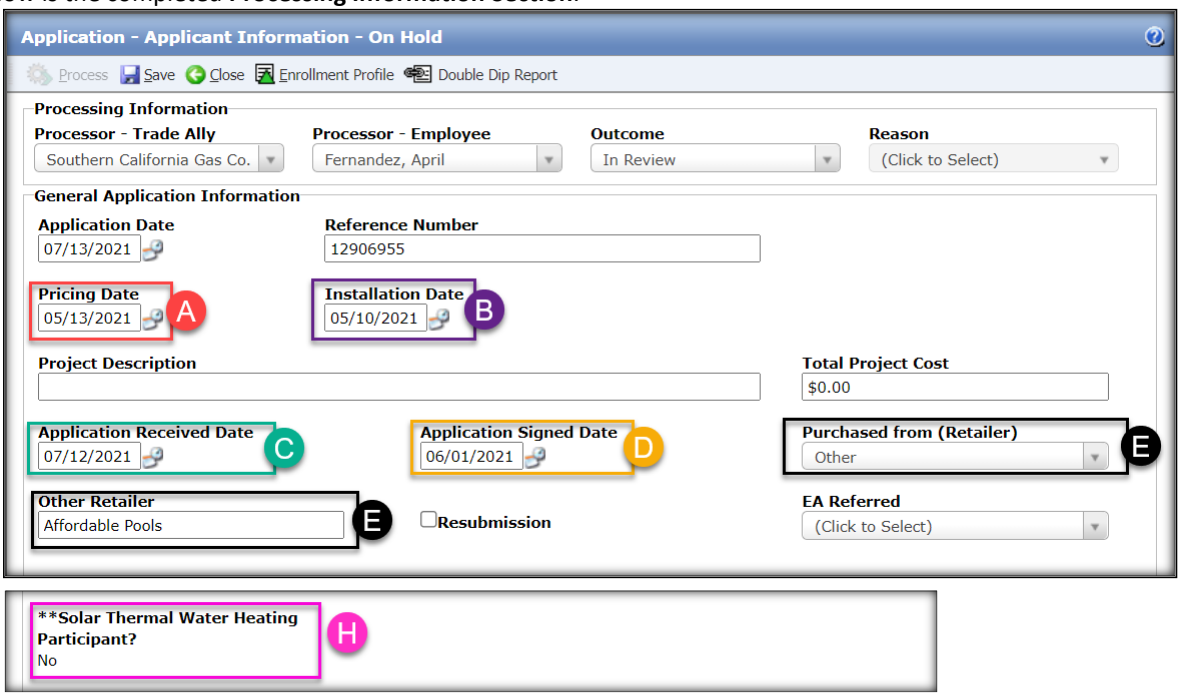


- If the application **IS FOR** a solar thermal water heater measure, you will be able to tell by the following key items:
 a. It will state **"2 – RES_Residential Energy Efficiency Program" Mobile Application** in the Workflow Step Summary on the left-hand side.
 b. The "Incentive" under Workflow Step Costs will be $3,500 or more.

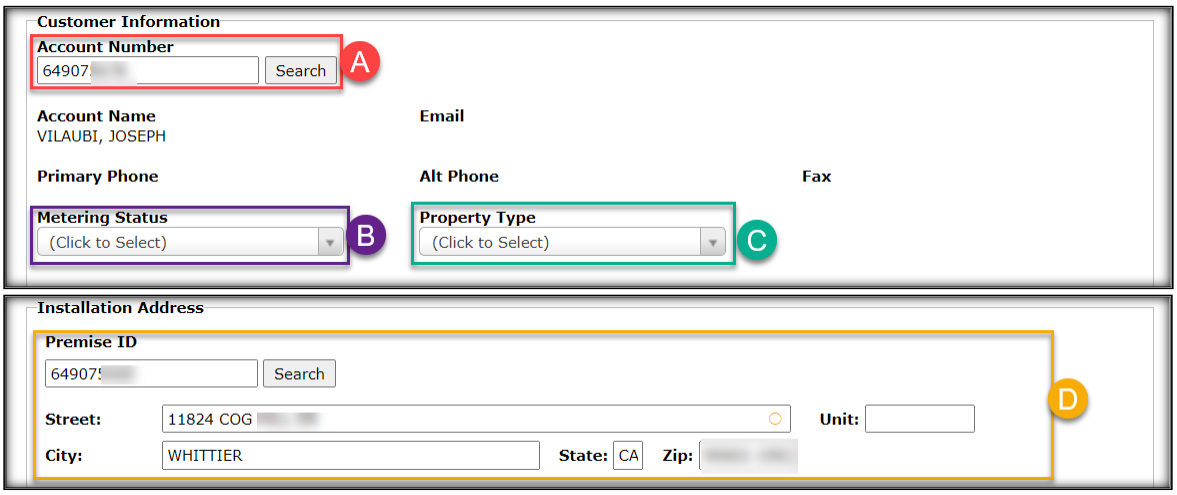


If you see these items, please review the Solar Thermal Water Heater section on how to proceed.

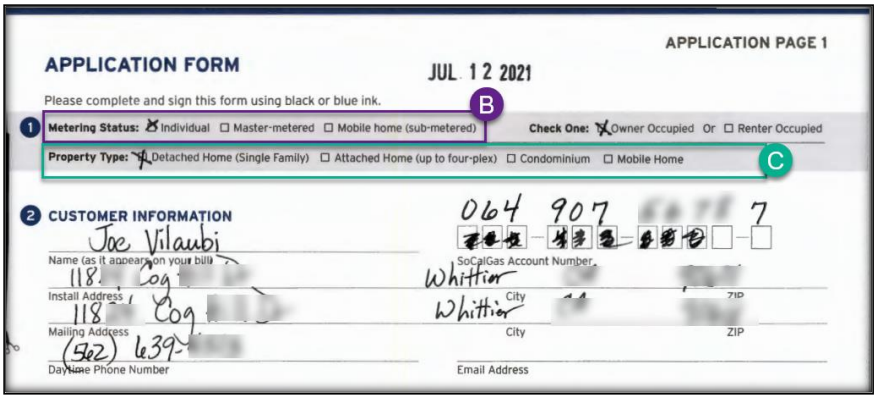
Below is the completed **Processing Information Section**.



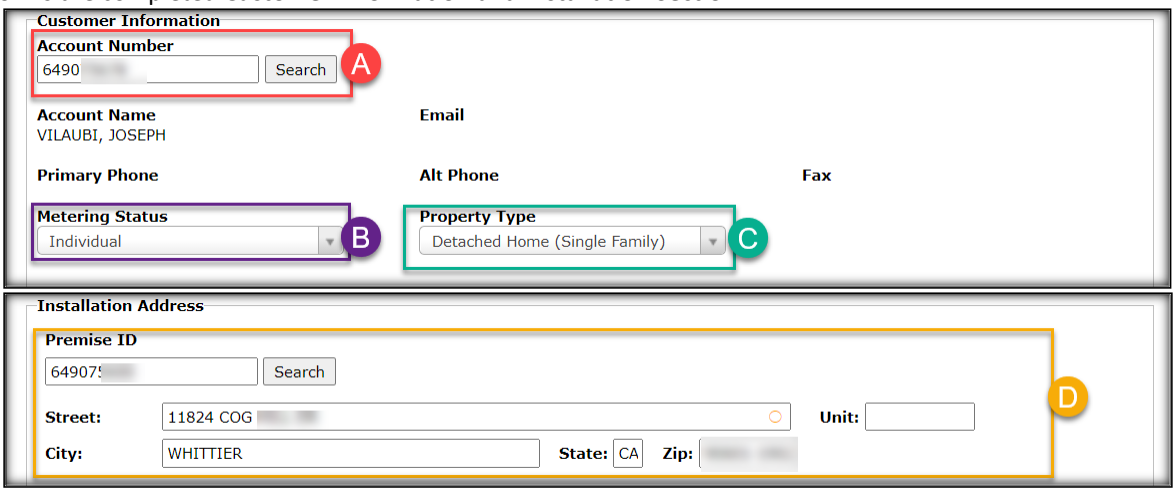
CUSTOMER INFORMATION AND INSTALLATION SECTION



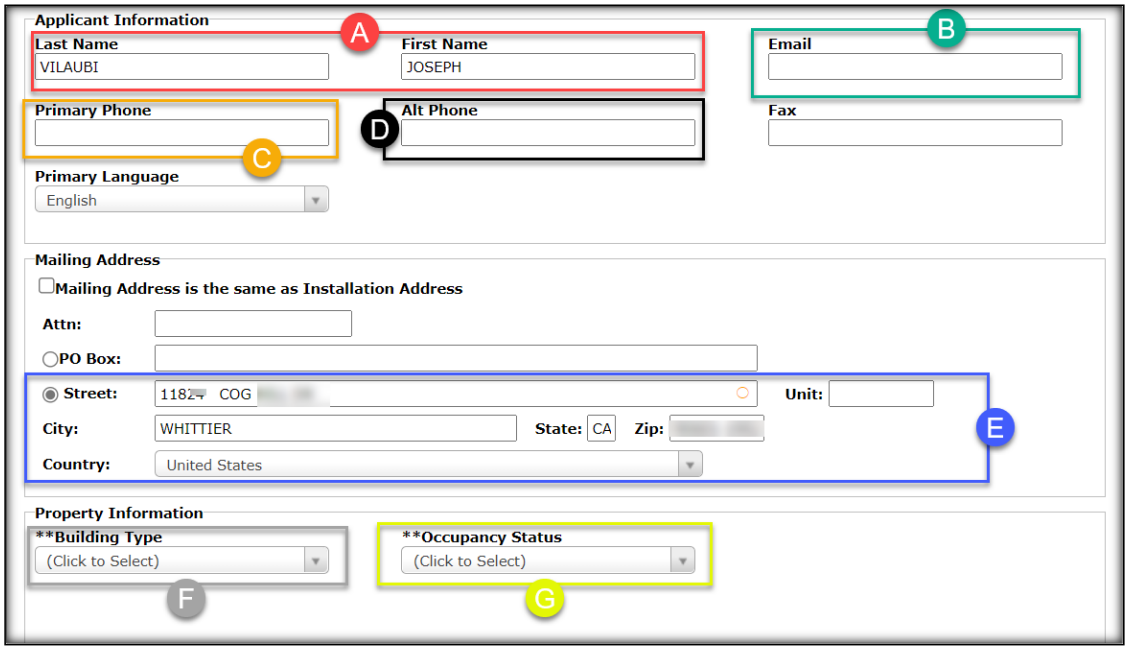
15. There are only 3 fields in the "Customer Information Section" that are editable that is the: *Account Number, Metering Status, Property Type*.
 A. **Account Number** = Will **NOT** be edited unless the account entered by RICOH does not match the application's install address.
 B. **Metering Status** = Take what customer checked on Section 1 of Application Page 1
 - Default to Individual is no box is checked
 C. **Property Type** = Take what customer checked on Section 1 of Application Page 1
 - Default to Detached Home (Single Family) if no box is checked
 D. **Installation Address** = Will **NOT** be edited unless the address entered by RICOH does not match the application's install address.



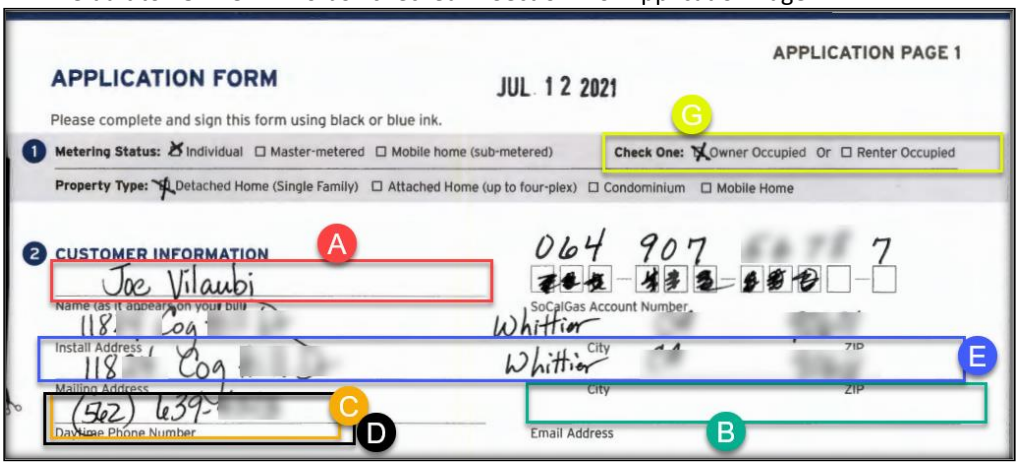
Below is the completed **Customer Information and Installation Section**



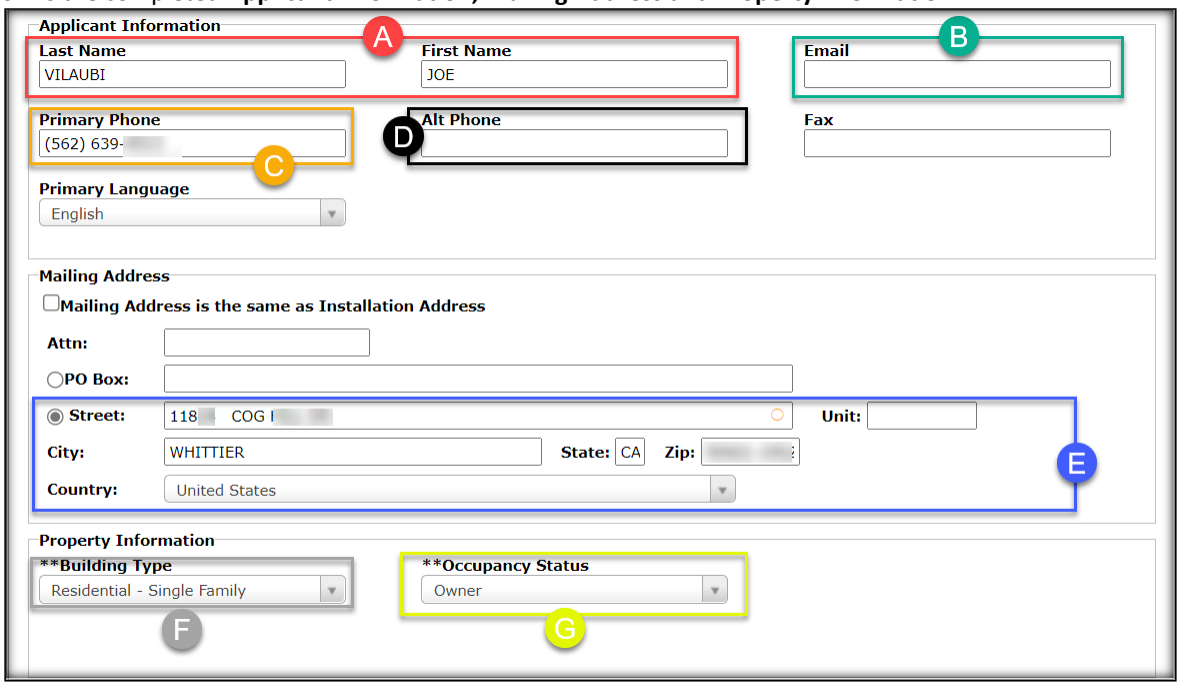
APPLICANT INFORMATION, MAILING ADDRESS, PROPERTY INFORMATION SECTION



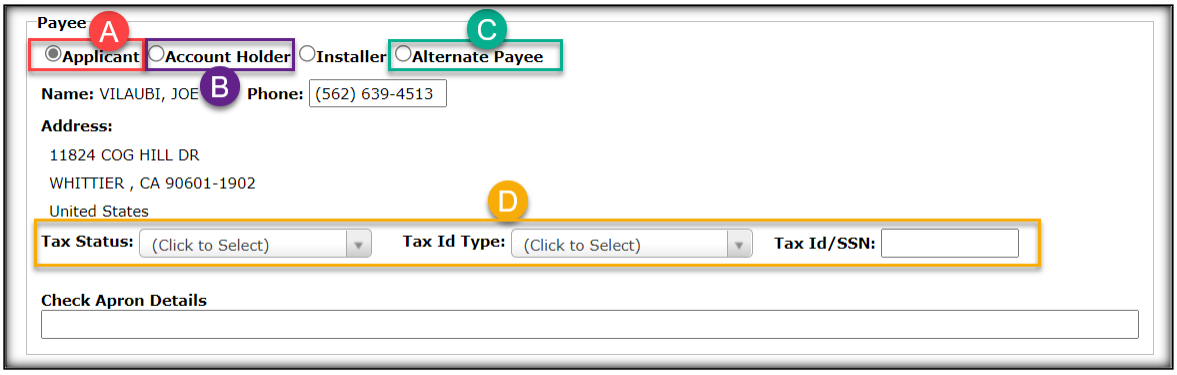
16. You will enter the information as it appears in the application, and you will update information as necessary in EECP.
 A. **First Name and Last Name** = Name written in Section 2 under Customer information
 B. **Email** = Enter email address if there is one
 C. **Primary Phone** = If filled from EECP leave alone and if not filled enter the daytime phone number.
 D. **Alt Phone** = Will be used when a customer provides a number that is different from the one populated by EECP. ***This is important to always add the different number to ensure the customer can be contacted if inspection is needed.**
 E. **Mailing Address** = This section defaults to the address registered in CIS. Update the address if information in application is different.
 F. **Building Type** = Residential - Single Family
 - Residential Mobile Home is only used for GS Rate Code
 G. **Occupancy Status** = Take from application.
 - Default to "Owner" if no box checked in Section 1 of Application Page 1



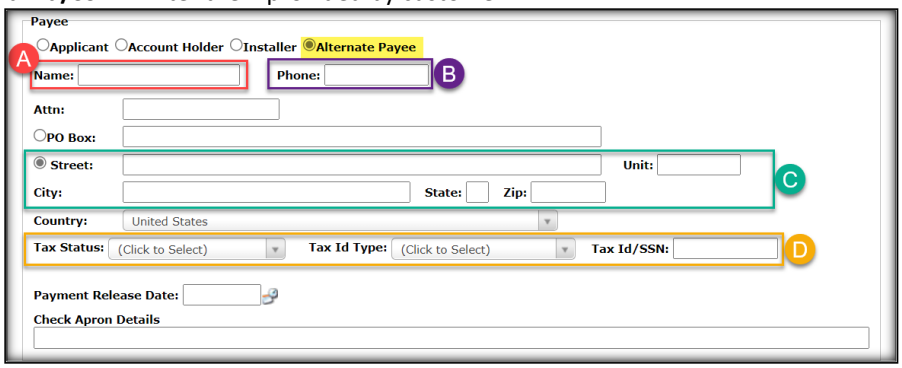
Below is the completed **Applicant Information, Mailing Address and Property Information**

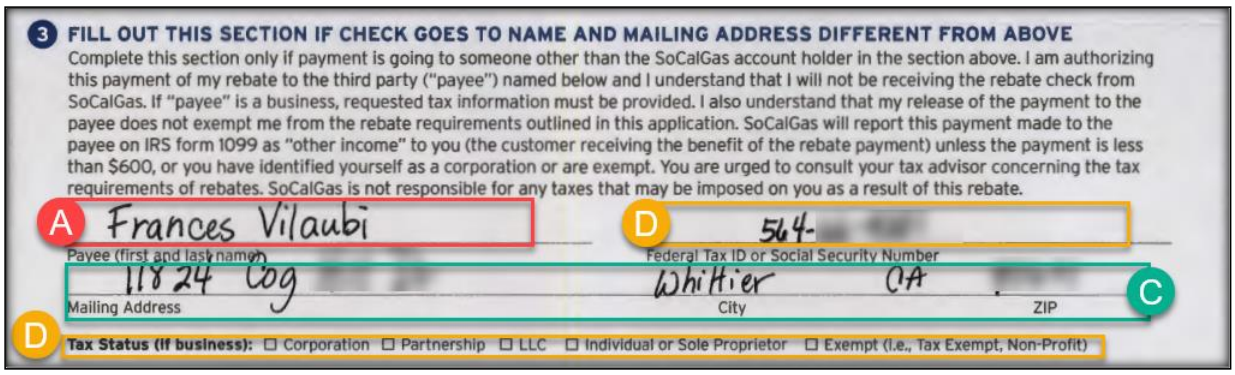


PAYEE SECTION

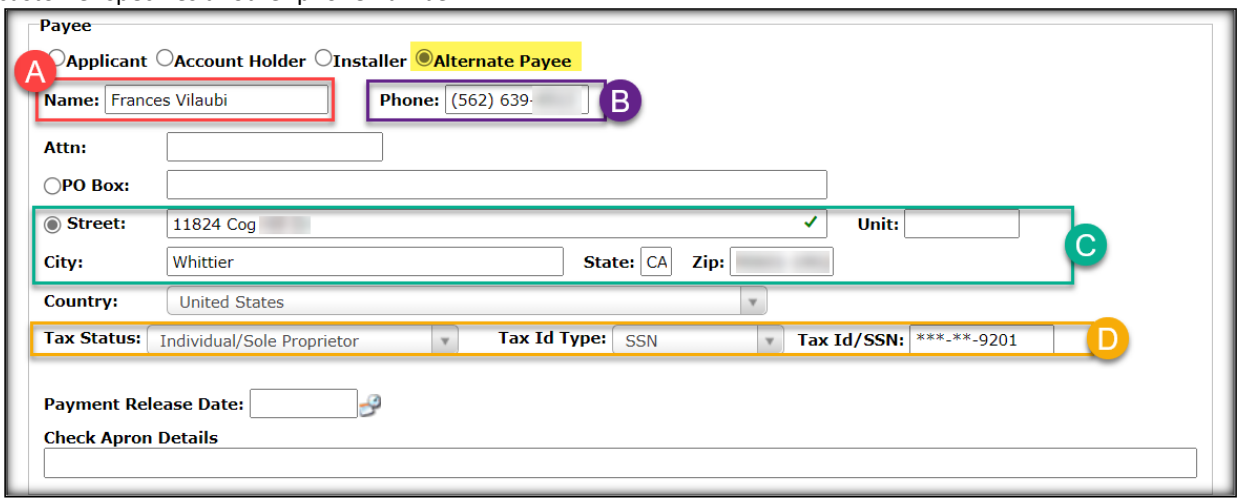


17. The "Payee" section of a Mail in Application will **ALWAYS** default to Applicant. We can choose to set the payee to the Applicant, the Account Holder, or an Alternate Payee (Installer will never be used).
 A. **Applicant** = Default in Mail in Application, you can use this if the applicant is the same as the account holder.
 B. **Account Holder** = You can use this if the applicant is the same as the account holder.
 C. **Alternate Payee** = To be used when Section 3 of the Application Page 1 is filled out.
 - Processor can **ONLY** enter the information requested by the customer in the payee section of the application when the signee is the account holder or someone on the account verified through CIS. Processor **MUST** note if signee is on account in Notes. Refer to Individual Customer Profile for more information.
 - If the signee of the application is not on the account. Please send the appropriate INC email/letter as the account holder needs to sign. If the signee is the Homeowner, they will need to reapply and provide proof of ownership. Examples are:
 1. Property Tax Bill
 2. Deed
 3. Mortgage
 4. Homeowners Insurance
 D. **Tax Information** = **ALWAYS** required if check is going to someone other than the account holder.
 - **Tax Status** – Choose what customer checks
 1. Choose **Individual/Sole Proprietor** if provided an SSN and customer does not check a box
 2. Choose **Corporation** if provided an EIN and customer does not check a box
 - **Tax Id Type** – If the numbers are written
 1. XXX-XX-XXXX this is an SSN
 2. XX-XXXXXXX this is an EIN
 - **Tax Id/SSN** – Enter the # provided by customer.





Completed Payee Section, the phone number will be taken from "Section 2 Customer Information" unless the customer specifies another phone number.

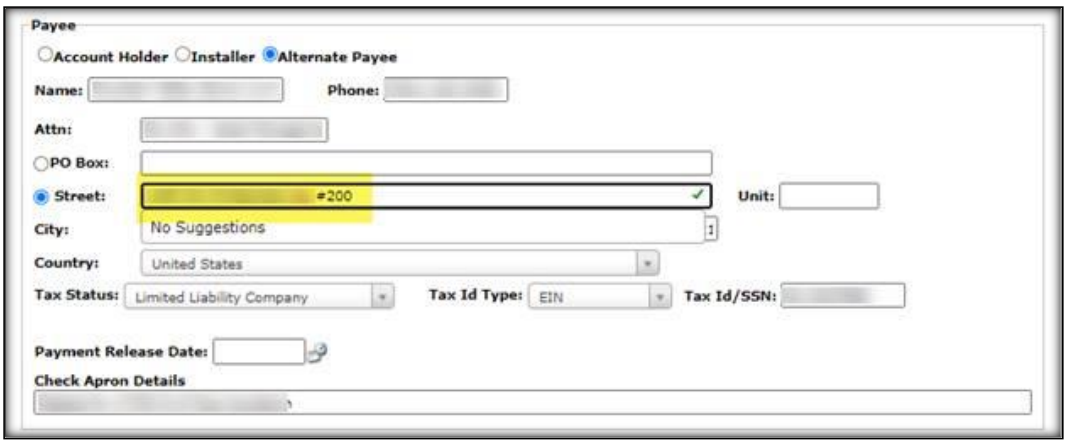


The payee address will be entered in EECP in accordance with the following hierarchy: the payee section, mailing address section, then the install address section. That is, if there is no payee or mailing address specified, then the payment will be sent to the install address and to the account holder.

Payee Address Length Notification

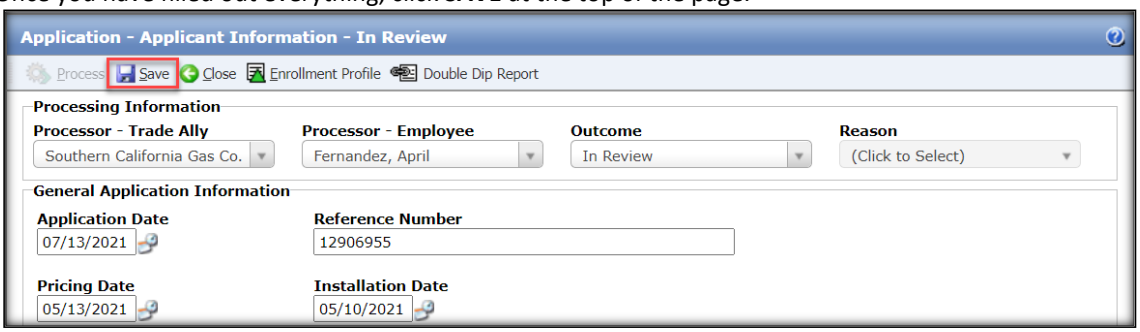
The system allows 35 characters in the Payee section due to the way SAP formats the payment. When you use the "Unit" text box, SAP adds 2 additional spaces as well as 'Unit:'. The issue with accepting the warning and not reducing the characters in the address is that SAP will cut the check, but digits will be left out of the payee address. As a workaround, the processor **MUST** enter the unit number within the address text box instead of the unit text box as shown below.

Important: After you enter the address (before you click out of the Street textbox) navigate to the top of the application and click "Save". The only way to ensure the system doesn't move the unit number back into the "Unit" text box, you **MUST** save as instructed above.



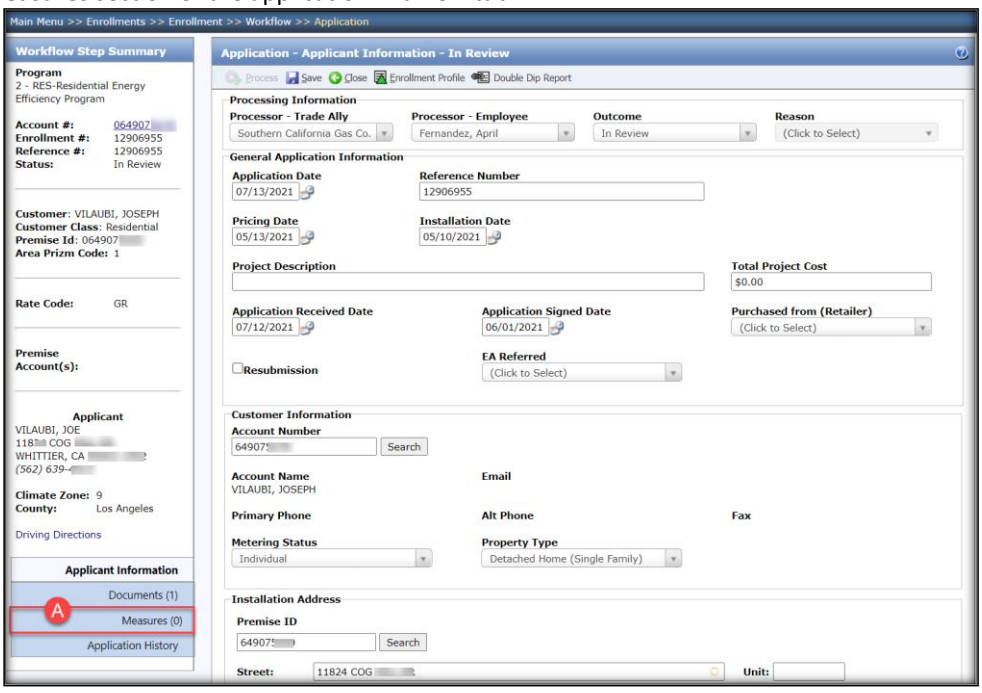
NOTE: Checks cannot go to an address outside of the United States.

18. Once you have filled out everything, click **SAVE** at the top of the page.

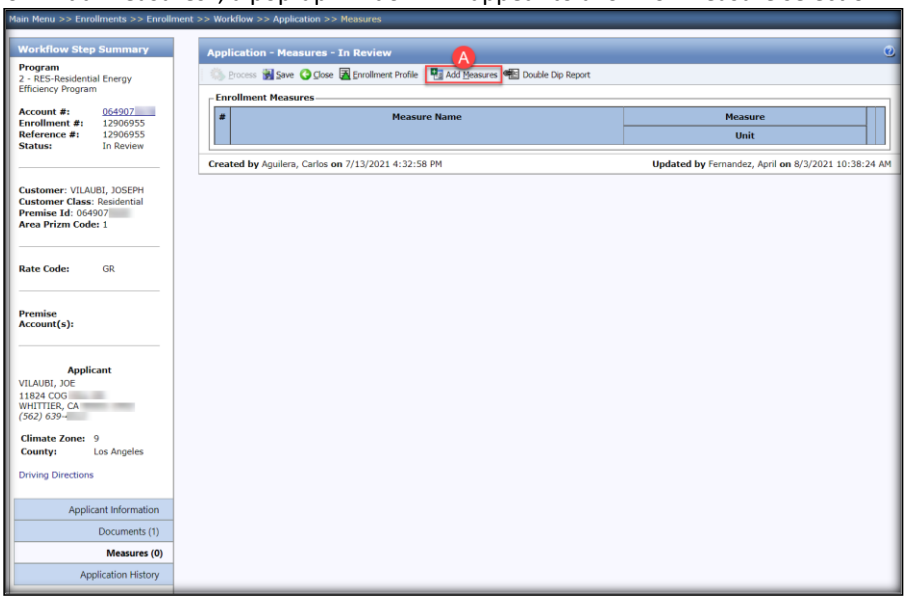


MEASURE SECTION

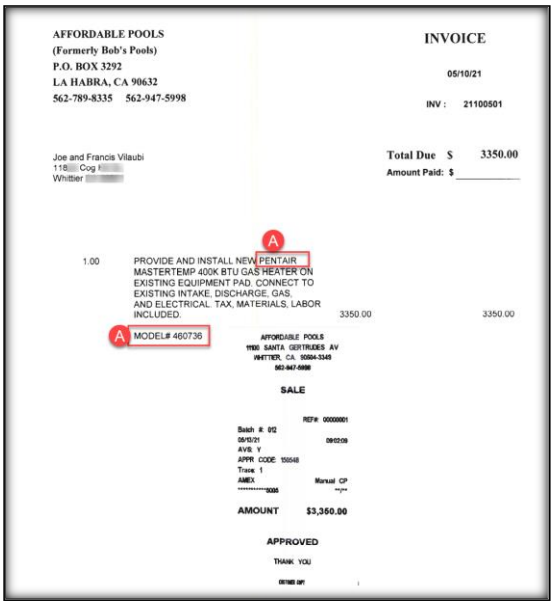
19. Open **Measures** section of the application in a new tab

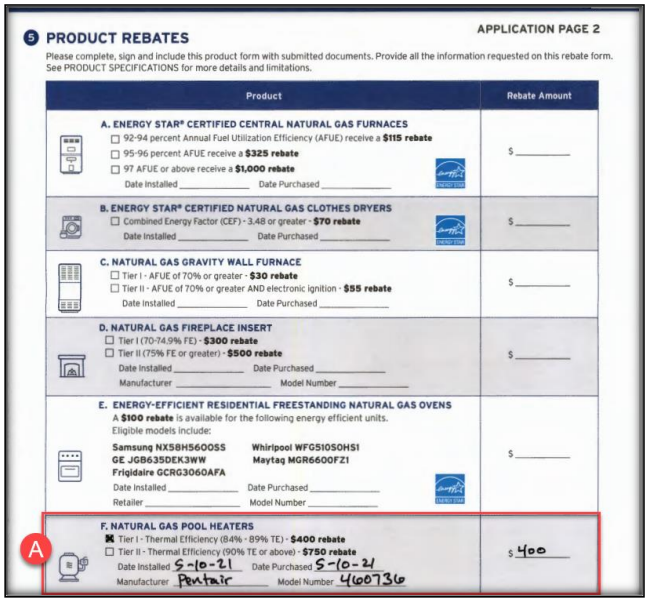


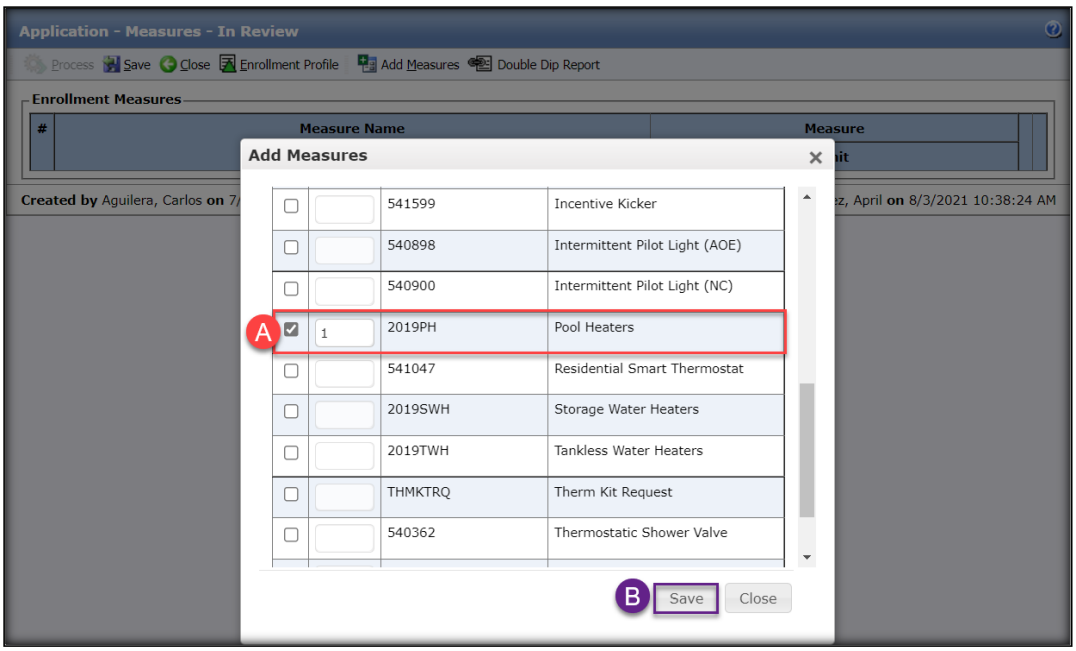
20. Once the Measures Tab is open
 A. Click on “Add Measures”, a pop-up window will appear to allow for measure selection.



21. Select measures according to what was provided in the mail in application and verify measure is the same as the invoice. If there is any discrepancy between the invoice and Product Rebates section, take what is on the invoice.
 A. Choose the measure and enter the quantity the customer is applying for.
 B. Then click on **Save**.





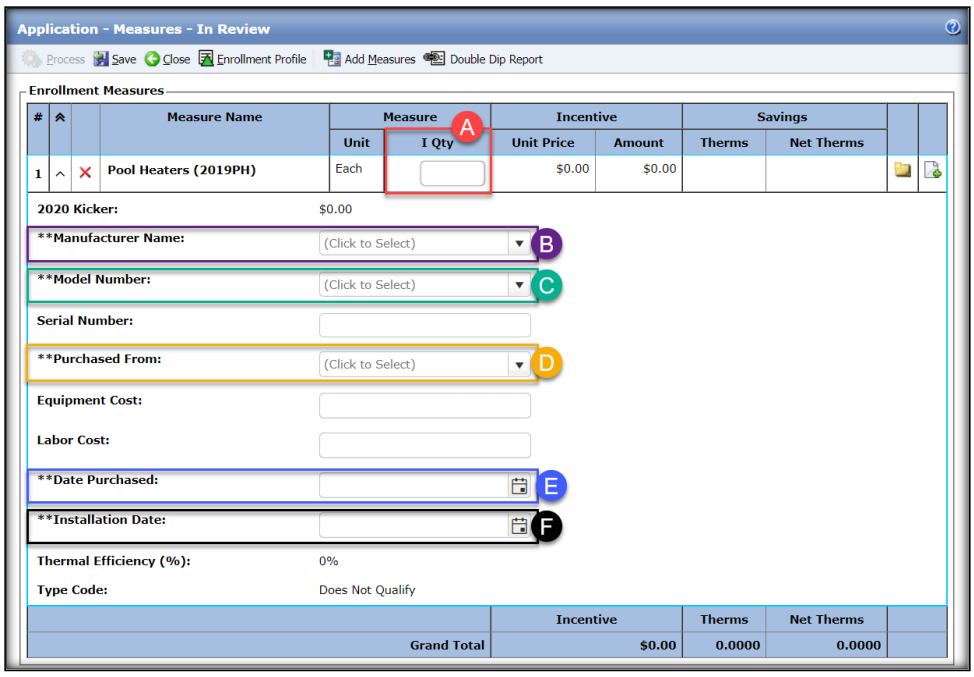


22. Complete the fields in the Measures page of EECP with ** as those field are required to process the application.
 A. **Measure I Qty** = Enter 1
 - If the customer is applying for 2 of the same measure, NEVER enter QTY 2. Instead add 2 separate line items.
 - If a customer applies for 2 or more of the same measure it will require a virtual inspection. Please go to Inspections section for more information.
 - If customer's invoice shows multiple units of the same measure purchased and they **DO** qualify, processor will reach out to customer to confirm the quantity they are applying for if measure is not seen in Double Dip in another enrollment. **[Nexant will place on Team Lead Review]**
 B. **Manufacturer Name** = Click on the make of the measure they are applying for or enter it manually if not in drop down.
 C. **Model Number** = Click on the model number found on the invoice or enter it manually if not in drop down.
 D. **Purchased From** = Click on where they purchased from
 - If not on the list, select "Other" and type it in
 E. **Date Purchased** = Same date used for "Pricing Date" on Application
 F. **Installation Date** = Same date used for "Installation Date" on Application

Any line item that does not have a ** is an optional field and the customer will not be penalized if they do not have those items.

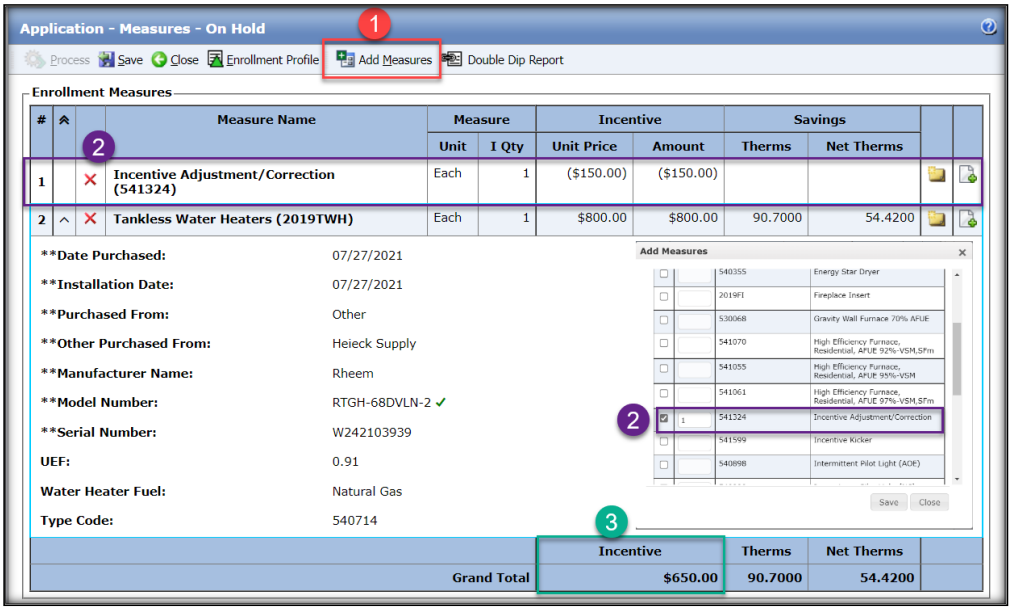
If you do not have the information for fields with ** the enrollment will be INC and cancelled and the appropriate email/letter will be sent so the customer can reapply.

IMPORTANT: When a measure is a DNQ it is important to still add it in EECP, so it shows up in the DD and if the customer reapplies.

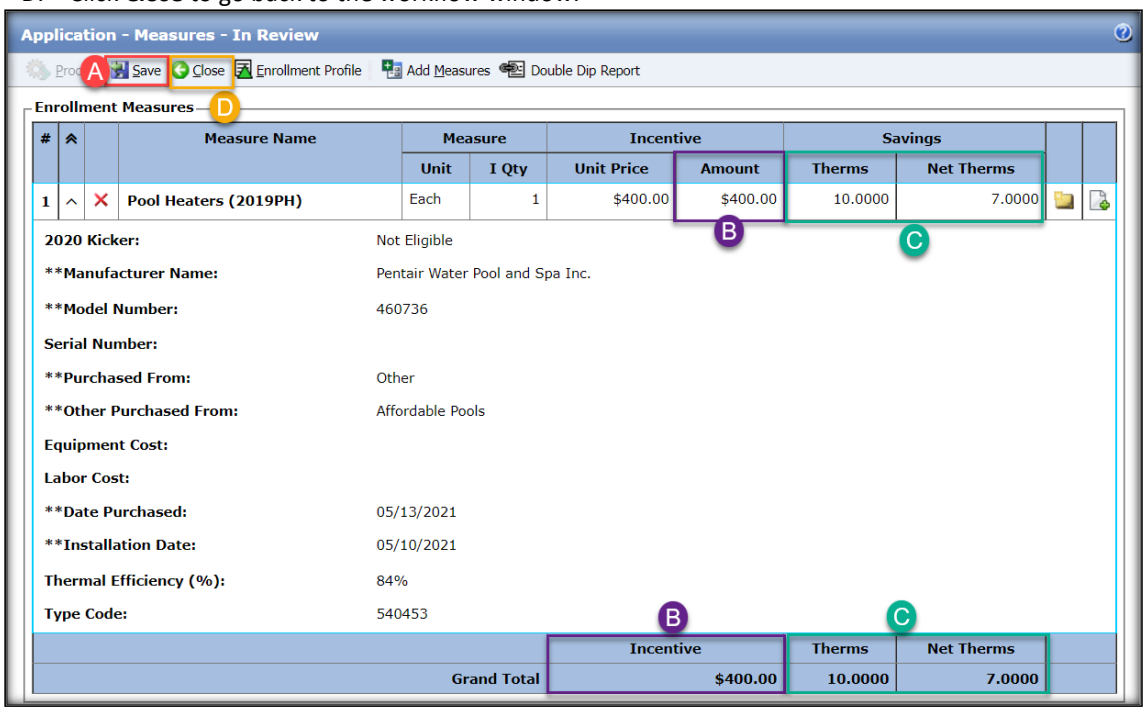


23. Once all information is entered the page will look as follows.
 A. Click **Save**
 B. Verify the incentive amount is populating the current incentive based off the current program offerings.
 - **IMPORTANT:** If the customer paid less than the incentive, you will use the "Incentive Adjustment/Correction" measure to lower the incentive up to the purchase price of the unit, not including additional charges such as shipping or taxes.
 1. Click on "Add Measure"
 2. Add the "Incentive Adjustment/Correction" and enter the amount to adjust the incentive based off on the purchase price on the invoice pretax.
 3. Verify the Incentive is adjusted to match the invoice

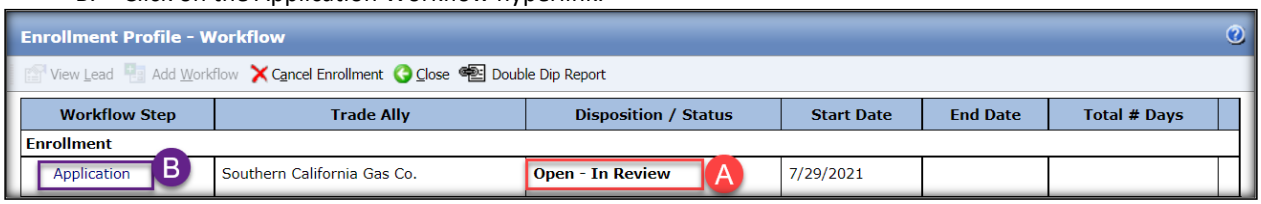
The image below is just to show the measure and it not part of the overall steps of the Pool Heater enrollment being used.



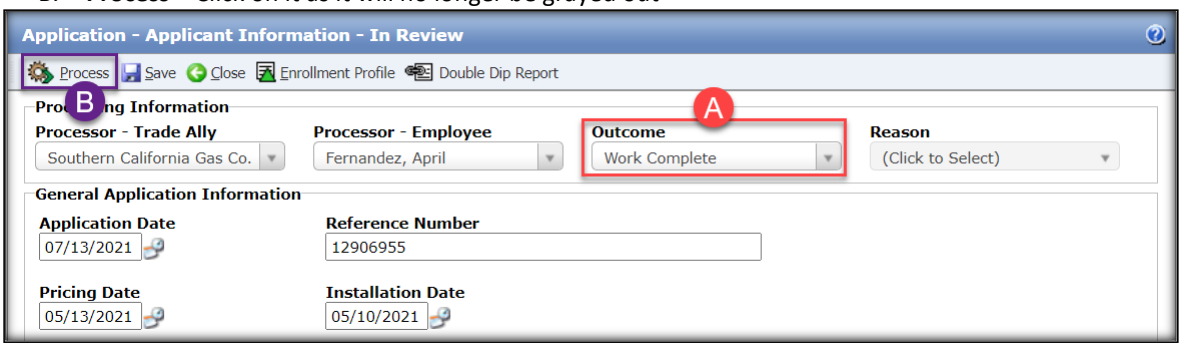
C. Verify the therm savings is populating.
D. Click **Close** to go back to the workflow window.



24. After clicking on "Close" you will be redirected to the **Enrollment Profile – Workflow**.
 A. Application Disposition/Status will be Open-In Review.
 B. Click on the Application Workflow hyperlink.

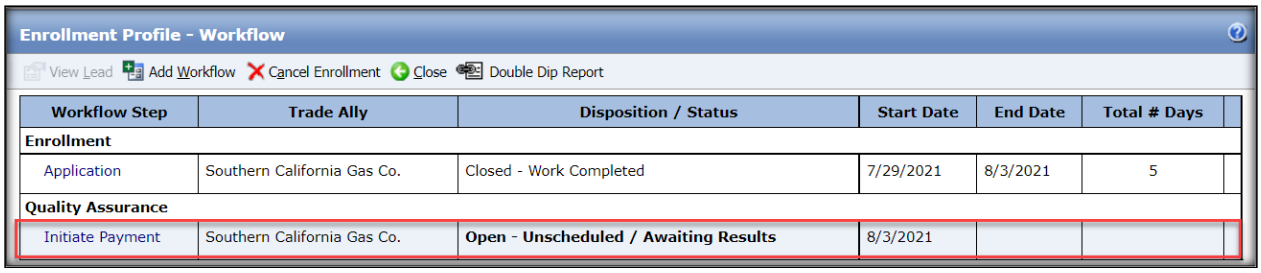


25. When you are back in the Application you will change the Outcome so you can process.
 A. **Outcome** = Change to Work Complete
 B. **Process** = Click on it as it will no longer be grayed out



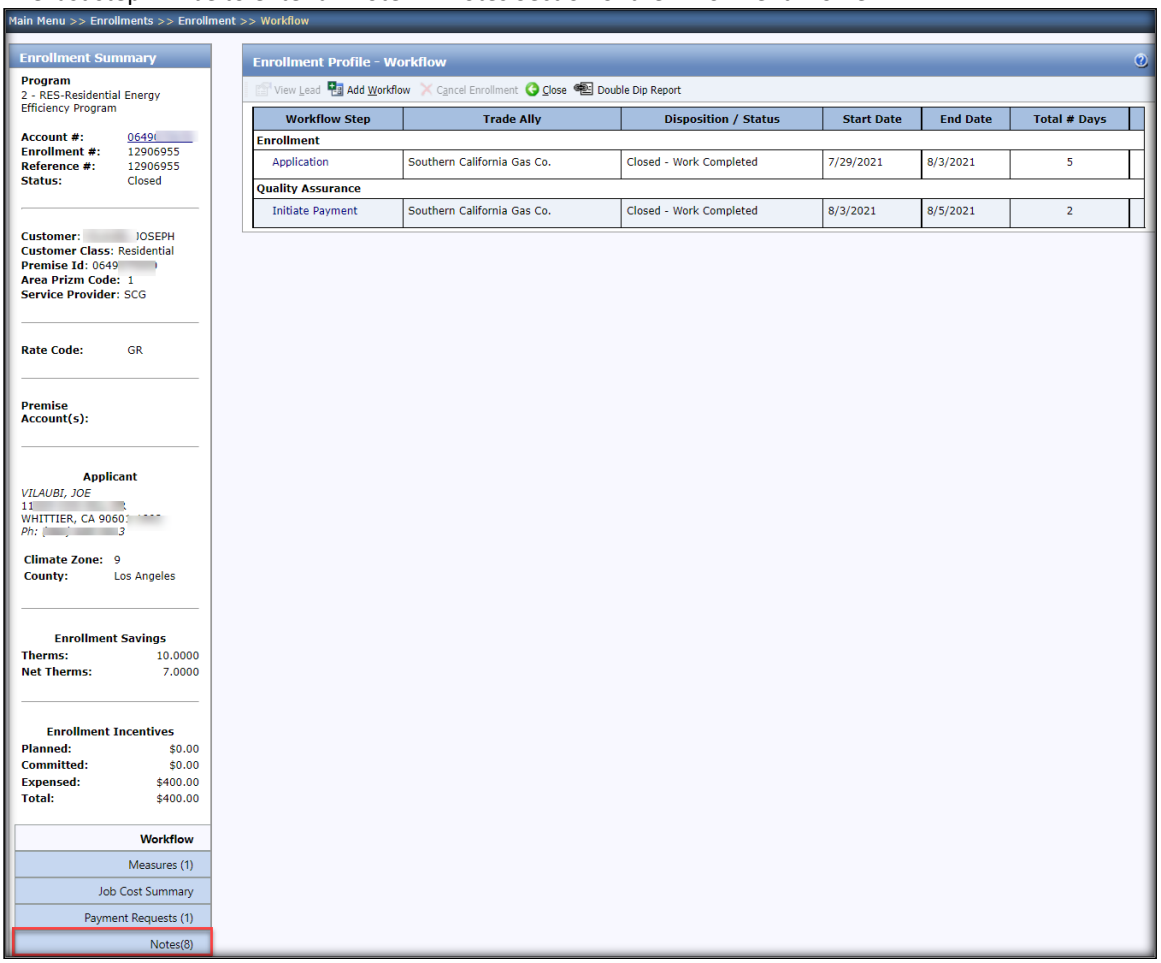
26. EECP directs the processor to the following screen. The Application Workflow "Disposition/Status" is displayed as "Closed – Work Completed" once processed. The processor will see 1 of 3 different workflows: Inspections, QA Review, or Initiate Payment displayed underneath the Application Workflow. Please ensure one of the

workflows has kicked off. ***IMPORTANT: If no workflow has kicked off, please notify Processing and QA Team Lead IMMEDIATELY

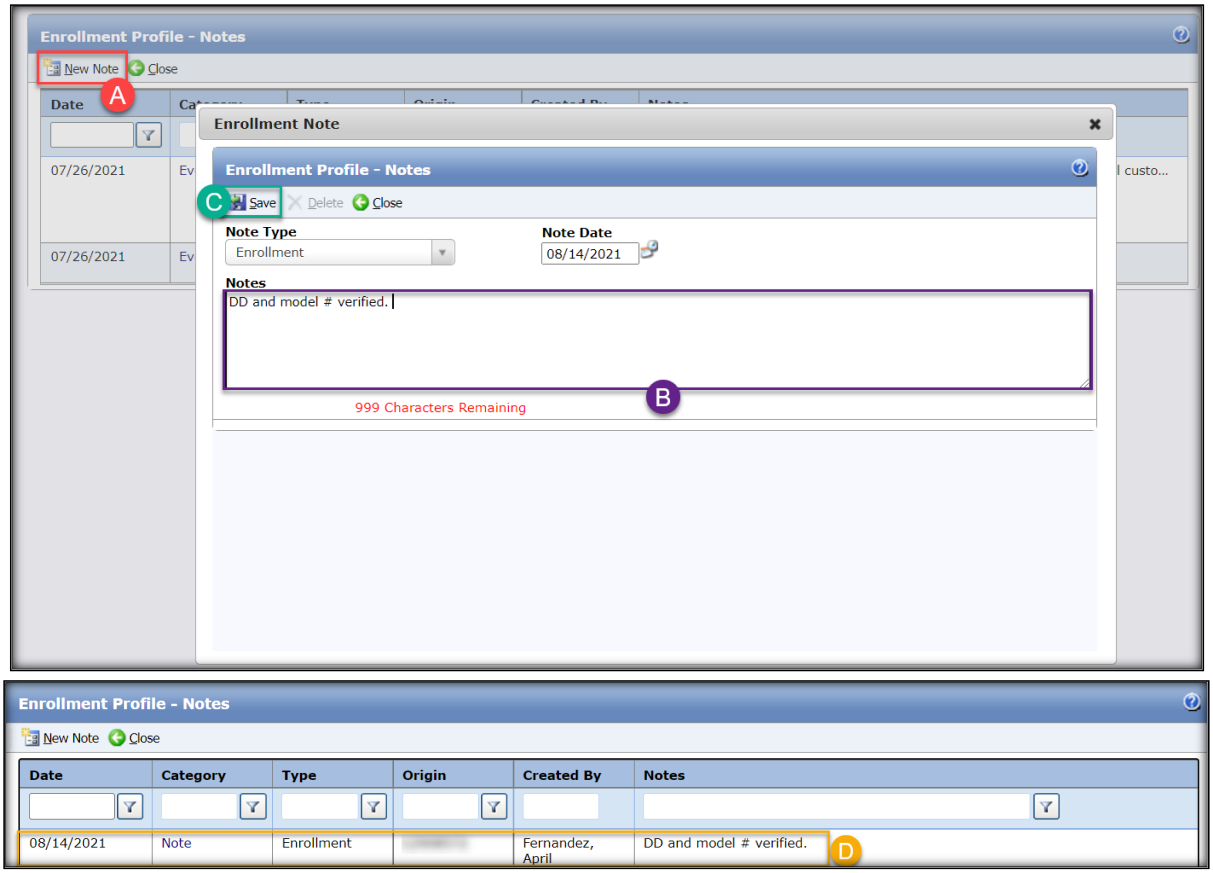


NOTES SECTION

27. The last step will be to enter a "Note" in Notes Section of the Enrollment Profile.



28. You will then be directed to the Enrollment Profile – Notes:
 A. Click on "New Note" and a new window will popup
 B. Always enter a note "DD and model # verified" to verify you have checked the double dip and you have verified the model # qualifies.
 - You will also enter a note anytime you deviate from Standard Processing Procedures, go to the Notes question in in the FAQ of the Appendix.
 C. Click on "Save" to save your note.
 D. Your completed note will save to the enrollment.



The enrollment is now complete.

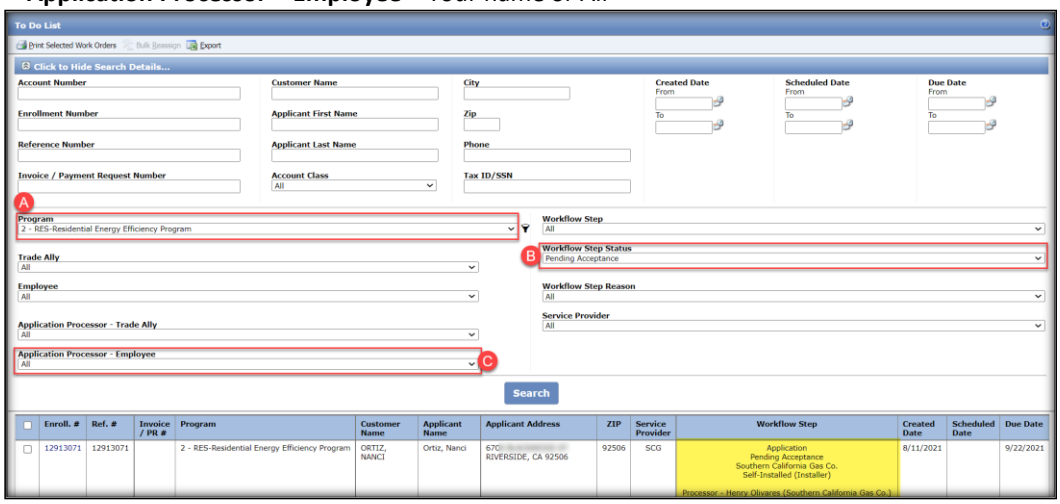
If for any reason the enrollment deviates from the standard procedures or it is an INC or DNQ, ensure your note also includes that information in the notes.

If the enrollment is unable to be processed due to any missing information or the equipment the customer applied for is a DNQ, please refer to Manually Generated Emails and Letters in the Appendix on the appropriate email/letter to send.

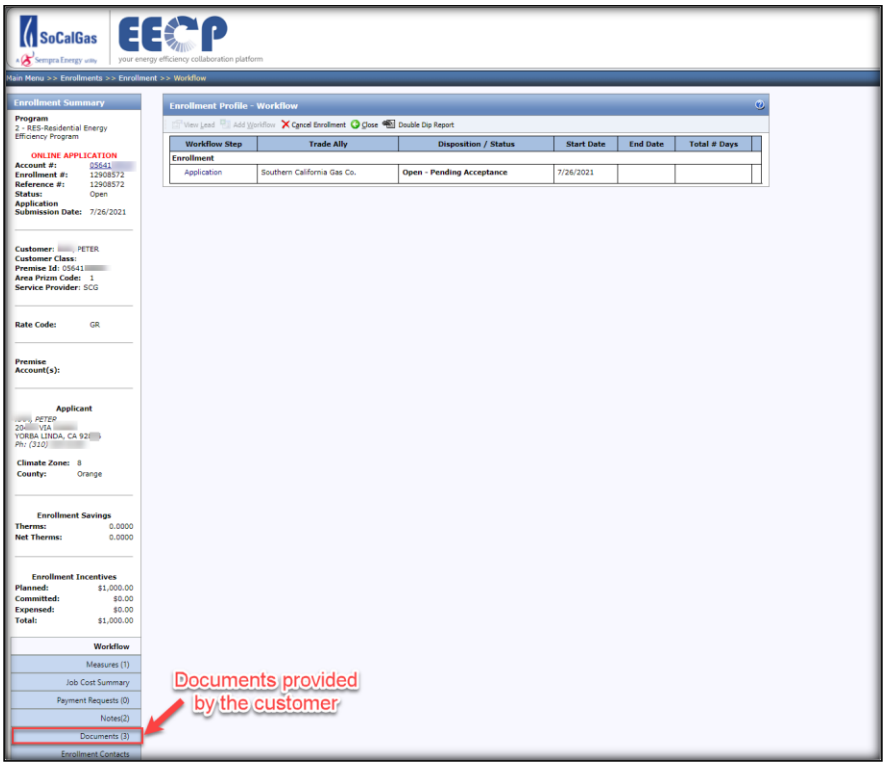
ONLINE APPLICATION

The below is a step-by-step process on how to process an Online Application.

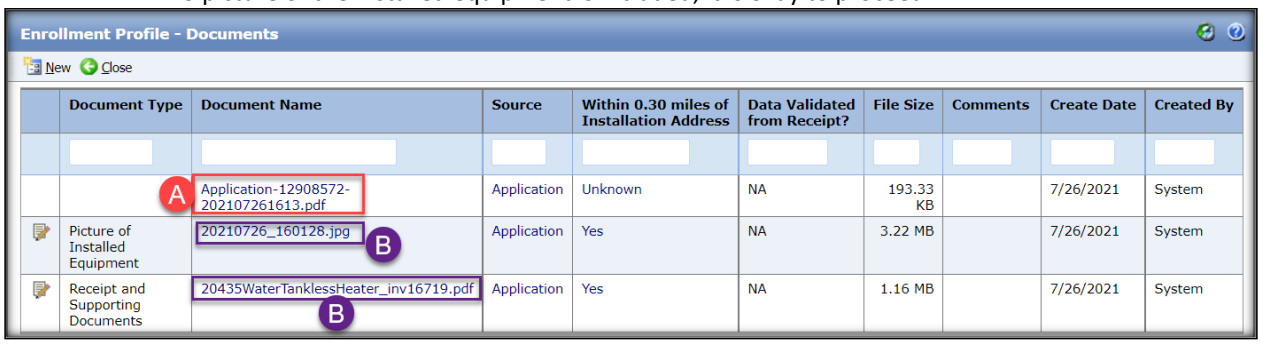
1. Enrollments can be found by navigating your To Do List.
 A. **Program** = 2 – RES-Residential Energy Efficiency Program
 B. **Workflow Step Status** = Pending Acceptance
 C. **Application Processor – Employee** = Your name or All



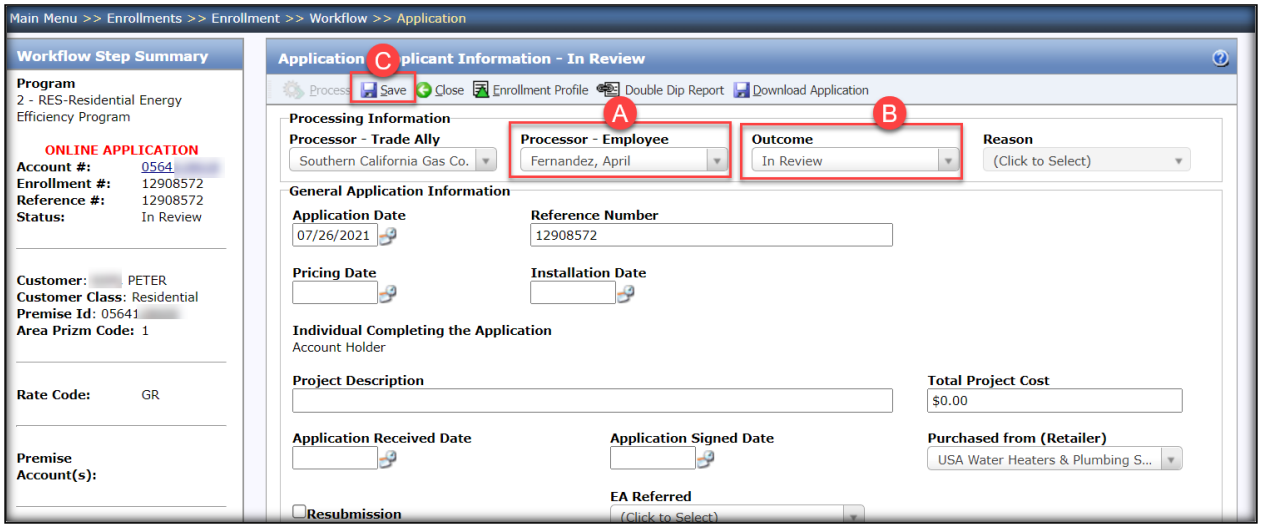
2. When enrollment hyperlink is clicked from the To-Do List, the user will be re-directed to the enrollment. The customer has uploaded all necessary documents into the documents sub menu section of the enrollment.



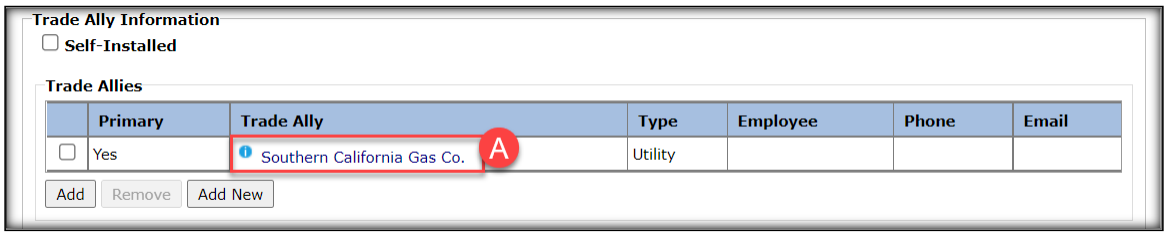
3. Click on the **Document folder** and you will be redirected to the image below. You will see several documents depending on what the customer has uploaded.
 A. The Application document is auto generated by the system, and you do not need to open. If the "Application" is not there, please notify the Team Leads.
 B. Click on any other documents uploaded by the customer.
 - The only required document for the online application is the "Receipt and Supporting Documents"
 - If no picture of the installed equipment is included, it is okay to proceed.

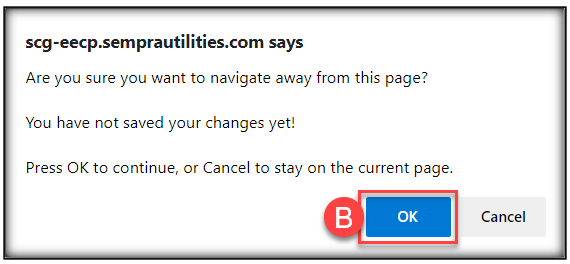


4. Go back to the **Enrollment Application Workflow**. Ensure the following is done:
 A. **Processor – Employee** = Your name
 B. **Outcome** = In Review (this will gray out the process button and prevent you from processing prematurely)
 C. **Click on "Save"**

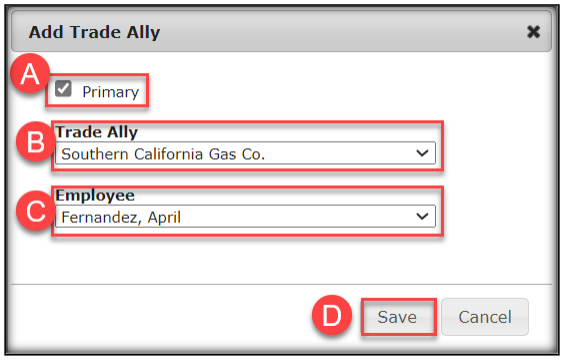


5. Scroll down to the **Trade Ally Information** section.
 A. Select **Southern California Gas Co.** hyperlink to add your name in the Trade Ally Information and an alert will popup.
 B. Click on the **OK** button

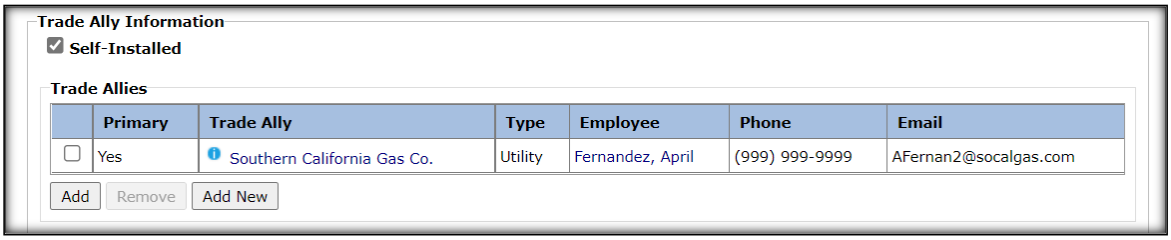




6. Once you see the "Add Trade Ally" window, do the following:
 A. **Primary** = Click on the box
 B. **Trade Ally** = Select Southern California Gas Co. from dropdown
 C. **Employee** = Select Your Name from dropdown
 D. **Click on "Save"**



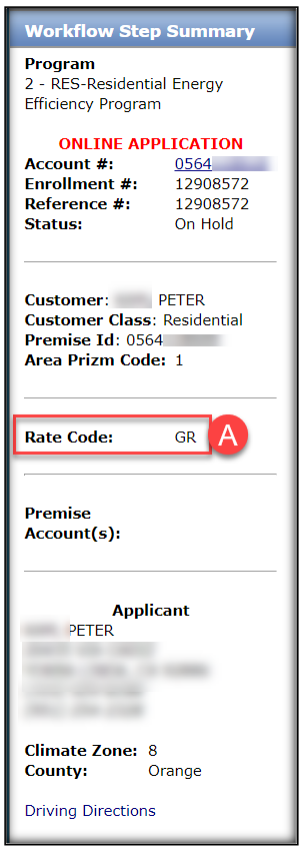
7. Once you click on **Save**, ensure the Trade Ally and your name is captured. It will look like the image below:



VERIFYING THE ACCOUNT AND DOCUMENTS

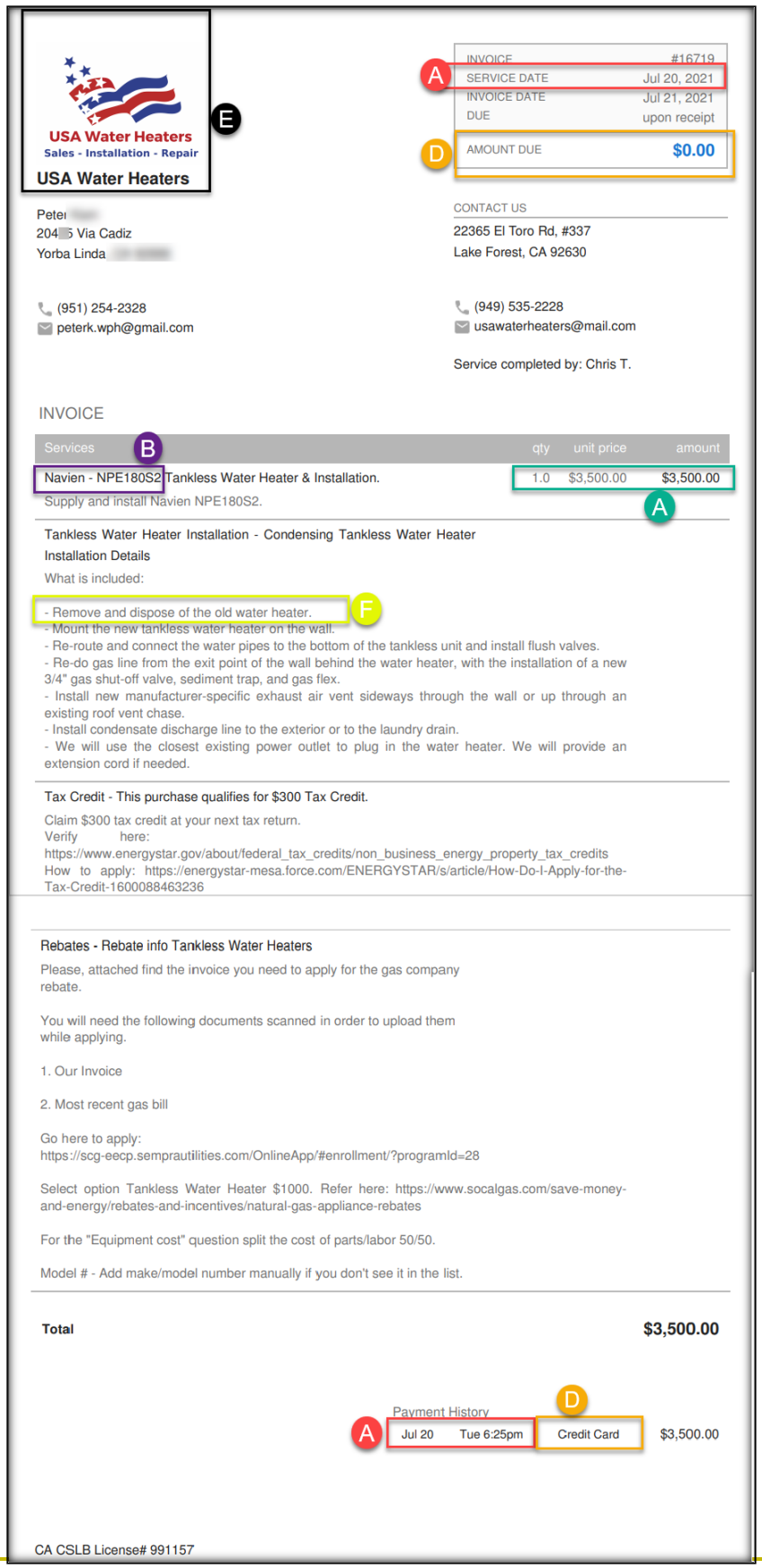
8. Next verify the customers Rate Code on the left under the Workflow Step Summary.
 A. Ensure it has the one of the following: GR, GR1, GRC, and GT-R, if the customer does not qualify, processor will DNQ the enrollment and send a letter/email to customer. *Please reference the Manually Generated Emails/Letters section in the Appendix.

For any other rate codes please refer to the Rate Code section above.



9. Next verify the measure's make/model specifications qualify for the incentive by locating their invoice/receipt. The invoice **MUST** have the following to proceed with the enrollment.
 A. Purchase date
 B. Model number
 C. Price of equipment or total price (there needs to be at least one)
 D. Method of payment
 E. Retailer/vendor information
 - If receipt is from Retailer, Retailer name only is sufficient
 - If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:
 - Contractor name and phone number
 - Contractor name and address
 - Contractor name and email
 F. For TWH **ONLY**, make sure the description **DOES NOT** state the customer previously had a TWH and replaced with another TWH as this would be an automatic DNQ. Per the application, the customer **MUST** be replacing a conventional tank type water heater.

If anything from above is missing you will send an INC email/letter allowing them to reapply or if the measure does not qualify you will send a DNQ email/letter stating, they did not qualify and why.



USA Water Heaters
Sales - Installation - Repair

USA Water Heaters

INVOICE	#16719
SERVICE DATE	Jul 20, 2021
INVOICE DATE	Jul 21, 2021
DUE	upon receipt
AMOUNT DUE	$0.00

Peter
204 5 Via Cadiz
Yorba Linda

(951) 254-2328
peterk.wph@gmail.com

CONTACT US
22365 El Toro Rd, #337
Lake Forest, CA 92630

(949) 535-2228
usawaterheaters@mail.com

Service completed by: Chris T.

INVOICE

Services	qty	unit price	amount
Navien - NPE180S2 Tankless Water Heater & Installation.	1.0	$3,500.00	$3,500.00
Supply and install Navien NPE180S2.			

Tankless Water Heater Installation - Condensing Tankless Water Heater
Installation Details
What is included:

- Remove and dispose of the old water heater.
- Mount the new tankless water heater on the wall.
- Re-route and connect the water pipes to the bottom of the tankless unit and install flush valves.
- Re-do gas line from the exit point of the wall behind the water heater, with the installation of a new 3/4" gas shut-off valve, sediment trap, and gas flex.
- Install new manufacturer-specific exhaust air vent sideways through the wall or up through an existing roof vent chase.
- Install condensate discharge line to the exterior or to the laundry drain.
- We will use the closest existing power outlet to plug in the water heater. We will provide an extension cord if needed.

Tax Credit - This purchase qualifies for $300 Tax Credit.

Claim $300 tax credit at your next tax return.
Verify here:
https://www.energystar.gov/about/federal_tax_credits/non_business_energy_property_tax_credits
How to apply: https://energystar-mesa.force.com/ENERGYSTAR/s/article/How-Do-I-Apply-for-the-Tax-Credit-1600088463236

Rebates - Rebate info Tankless Water Heaters

Please, attached find the invoice you need to apply for the gas company rebate.

You will need the following documents scanned in order to upload them while applying.

1. Our Invoice

2. Most recent gas bill

Go here to apply:
https://scg-eecp.semprautilities.com/OnlineApp/#enrollment/?programId=28

Select option Tankless Water Heater $1000. Refer here: https://www.socalgas.com/save-money-and-energy/rebates-and-incentives/natural-gas-appliance-rebates

For the "Equipment cost" question split the cost of parts/labor 50/50.

Model # - Add make/model number manually if you don't see it in the list.

Total **$3,500.00**

Payment History

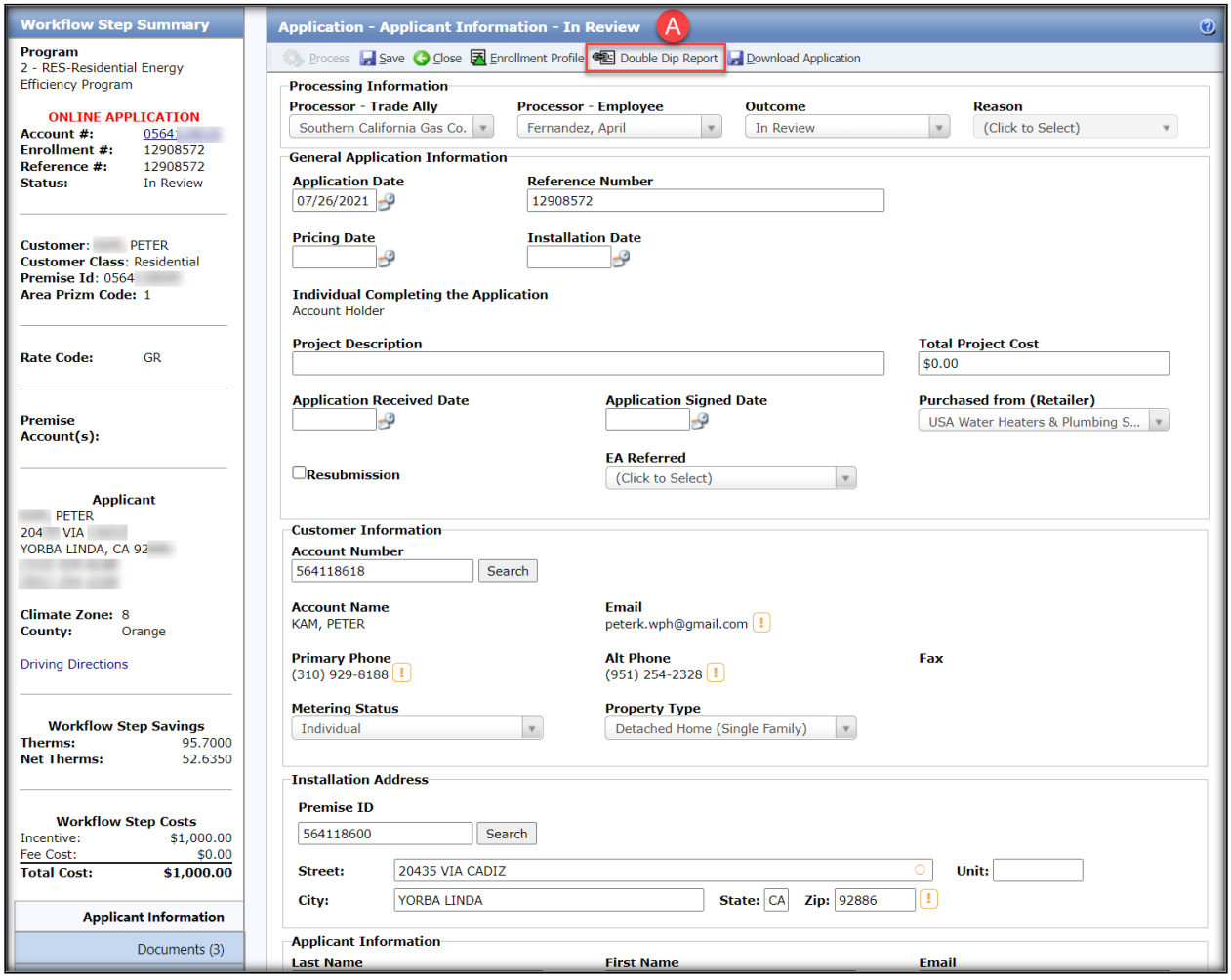
Jul 20	Tue 6:25pm	Credit Card

$3,500.00

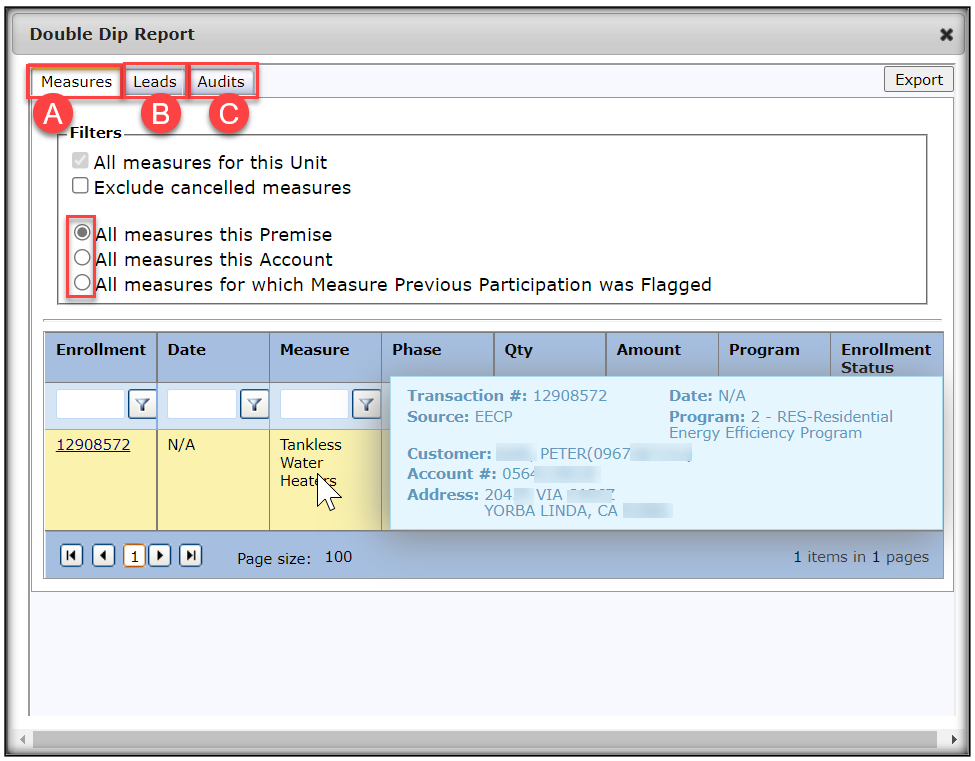
CA CSLB License# 991157

Once you have verified their equipment qualifies for the rebate and you have the 5 items above you can proceed with the application.

10. ALWAYS verify the Double Dip to ensure we are not paying the customer for something they already received a rebate for within the past 5 years. For more information on **Double Dip**, please reference it above. *IMPORTANT: There are times when customers apply for a rebate however the exact 5 years have not passed. It is okay to proceed with the application as you can go by the year of submission and not the exact date.
 A. Click on **Double Dip**



11. Once you have clicked on the Double Dip, do the following:
 A. Click on **Measures**, including "All measures this Premise, All measures this Account, and All measures for which Measure Previous Participation was Flagged"
 B. Click on **Leads**, including "All Leads by Premise and All Leads by Account"
 C. Click on **Audits**, including "All Audits by Premise and All Audits by Account"

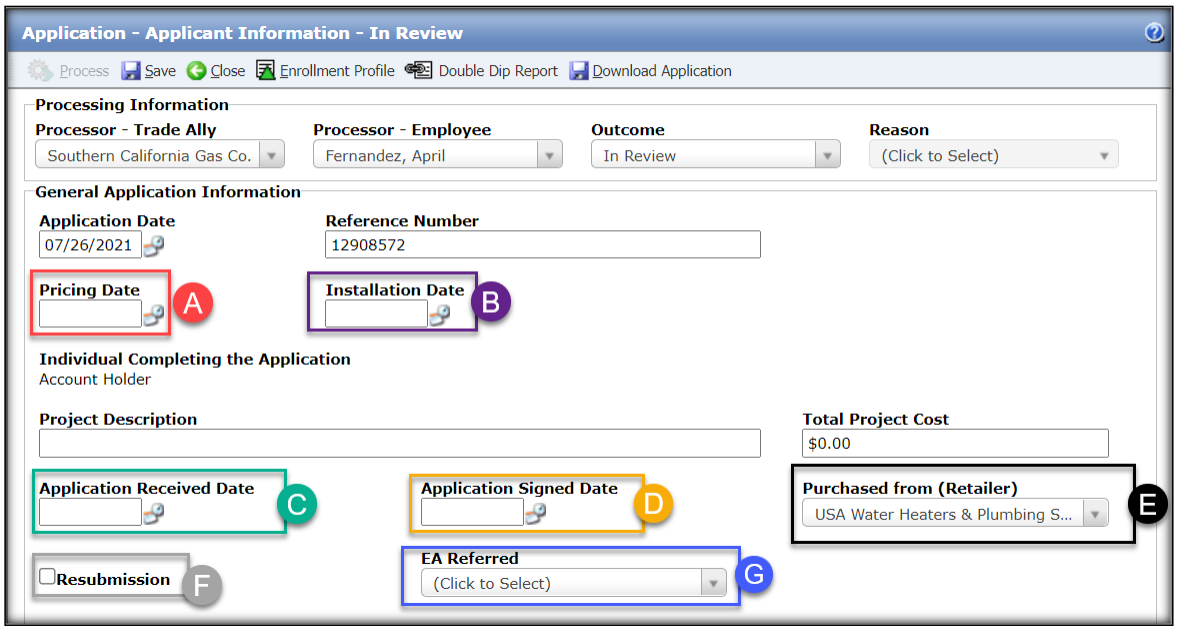


When you have verified the customer has no previous DD for the same measure, you can continue to review what the customer has entered in EECP.

For the next steps, all information will be reviewed to ensure it matches what is on the receipt/invoice.

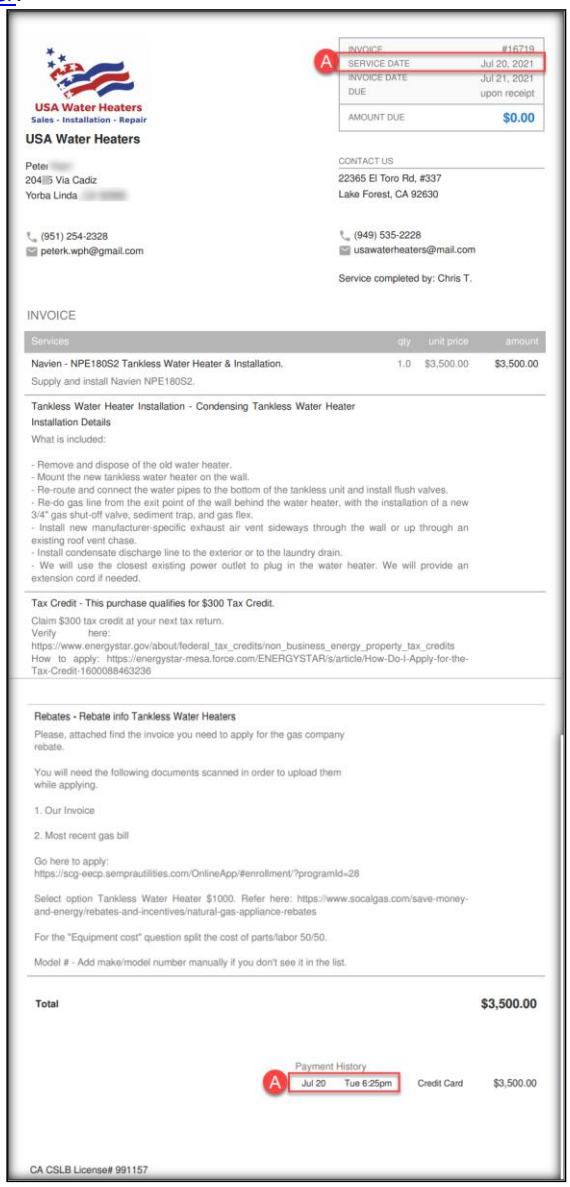
PROCESSING INFORMATION SECTION

The fields below are what you will need to fill out and verify what the customer entered is correct:



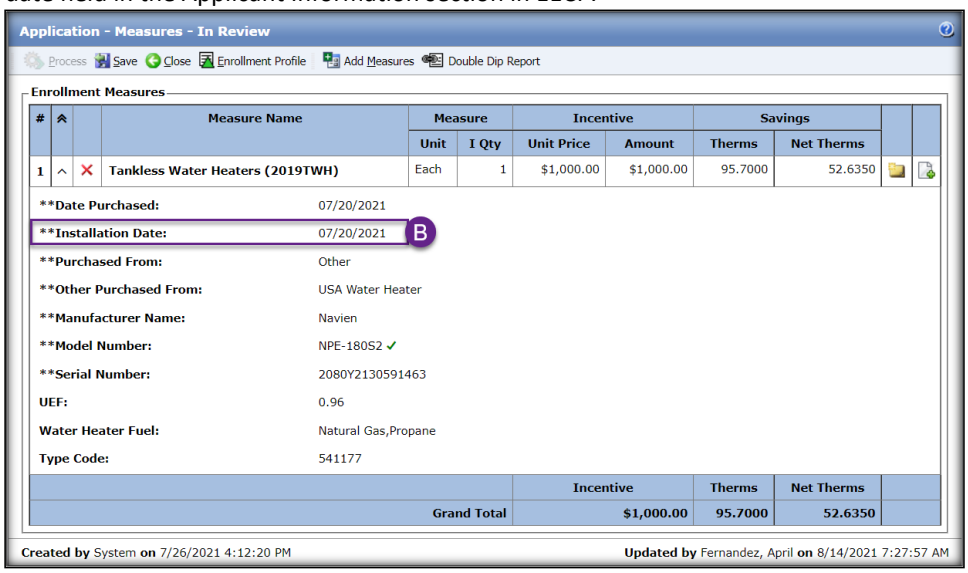


15. Fields A-E, and H are mandatory, and F-G are only if it applies. Fill out the following fields:
 A. **Pricing Date** = Purchase date taken from receipt/invoice ****Unless otherwise directed by Team Lead due to IO Year. See Pricing Date in Appendix for more information.**
 - If purchased from a retailer such as Best Buy, Home Depot, etc. The purchase date will be the date on the receipt provided to the customer at the time of checkout.
 - If purchased from a store which provides invoices, the purchase date will be the PAID IN FULL, PAID, PAID BY CHECK date. If this information is not provided, then the actual INVOICE DATE will take place as the purchase date.
 - Purchase date shall not be verified verbally by phone or through email; updated invoice documentation is always required
 - If **NO** purchase date is on the invoice this is an INC and the customer will be asked to reapply in system email/letter.



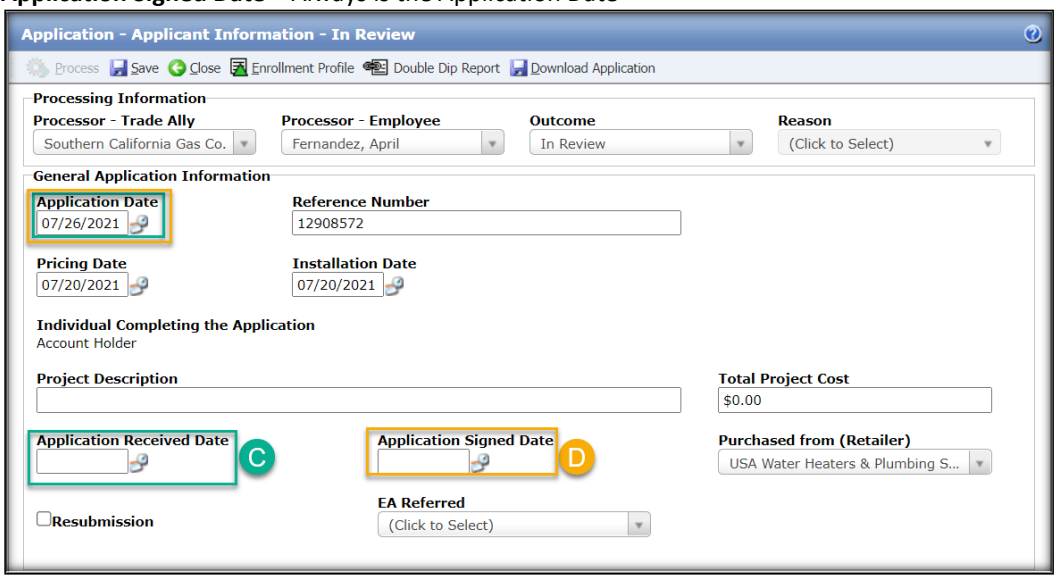
B. **Installation Date** = Verify a date was entered in the measures subsection.

- If the installation date is after the received date and the date has not passed, the enrollment will be an INC and the appropriate INC email/letter. The customer can reapply once the product has been installed.
- If a customer purchased multiple measures (in the same receipt), but only applied for some of them, then the processor can use the same install date for the other measures on the SAME receipt and process them along with the rest of the application.
- If a customer is applying for multiple eligible measures, record the earliest install date on the install date field in the Applicant Information section in EECP.



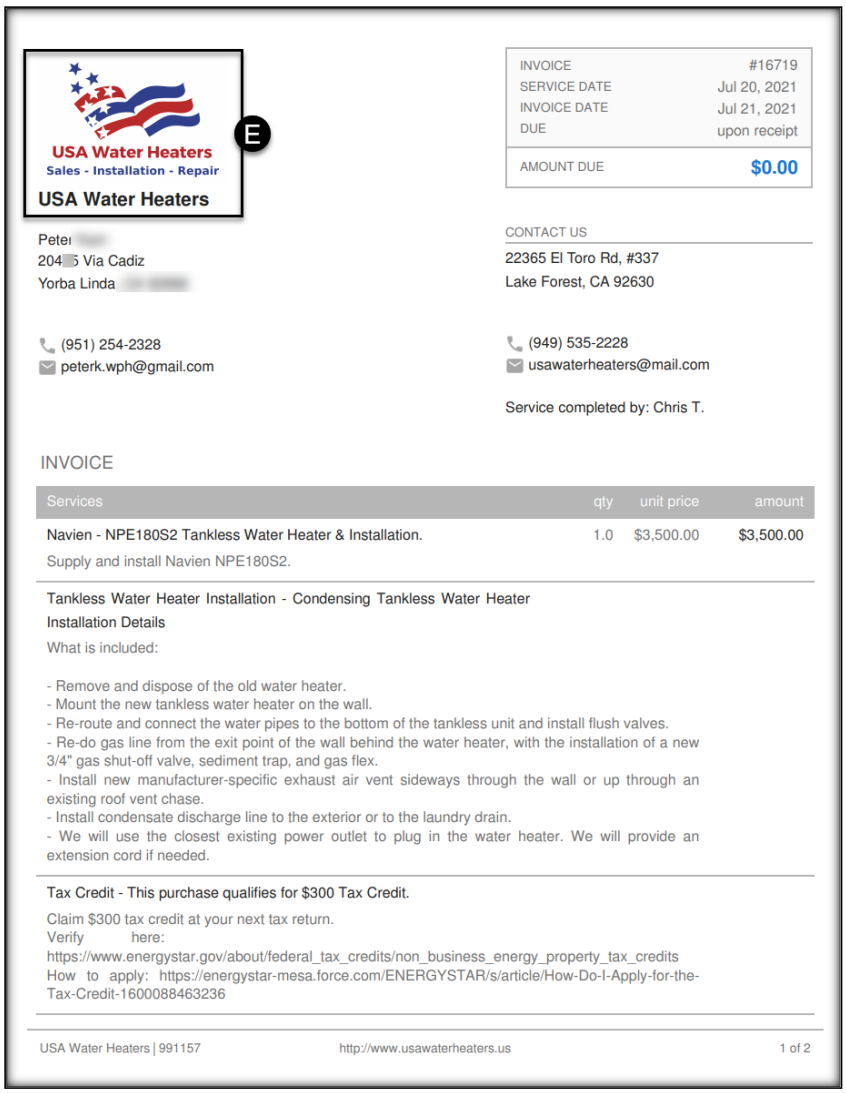
C. **Application Received Date** = Always is the Application Date

D. **Application Signed Date** = Always is the Application Date



E. **Purchased from (Retailer)** – Verify what the customer entered is the retailer on the invoice/receipt

- If the customer left it blank locate the retailer in the dropdown.
- If not in dropdown, use "Other" and manually enter it.



USA Water Heaters
Sales - Installation - Repair
USA Water Heaters

E

INVOICE	#16719
SERVICE DATE	Jul 20, 2021
INVOICE DATE	Jul 21, 2021
DUE	upon receipt
AMOUNT DUE	$0.00

Pete
204 Via Cadiz
Yorba Linda

(951) 254-2328
peterk.wph@gmail.com

CONTACT US
22365 El Toro Rd, #337
Lake Forest, CA 92630

(949) 535-2228
usawaterheaters@mail.com

Service completed by: Chris T.

INVOICE

Services	qty	unit price	amount
Navien - NPE180S2 Tankless Water Heater & Installation.	1.0	$3,500.00	$3,500.00

Supply and install Navien NPE180S2.

Tankless Water Heater Installation - Condensing Tankless Water Heater
Installation Details
What is included:

- Remove and dispose of the old water heater.
- Mount the new tankless water heater on the wall.
- Re-route and connect the water pipes to the bottom of the tankless unit and install flush valves.
- Re-do gas line from the exit point of the wall behind the water heater, with the installation of a new 3/4" gas shut-off valve, sediment trap, and gas flex.
- Install new manufacturer-specific exhaust air vent sideways through the wall or up through an existing roof vent chase.
- Install condensate discharge line to the exterior or to the laundry drain.
- We will use the closest existing power outlet to plug in the water heater. We will provide an extension cord if needed.

Tax Credit - This purchase qualifies for $300 Tax Credit.

Claim $300 tax credit at your next tax return.
Verify here:
https://www.energystar.gov/about/federal_tax_credits/non_business_energy_property_tax_credits
How to apply: https://energystar-mesa.force.com/ENERGYSTAR/s/article/How-Do-I-Apply-for-the-Tax-Credit-1600088463236

USA Water Heaters | 991157 http://www.usawaterheaters.us 1 of 2

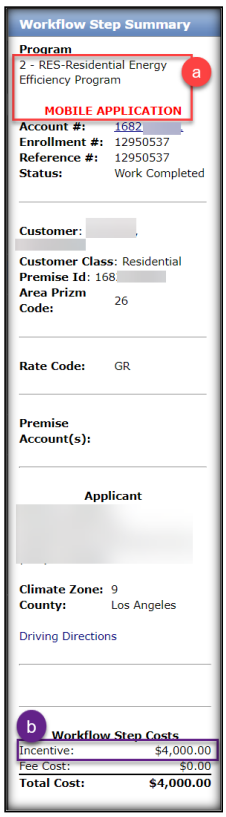
F. If applicable: Resubmission = Will be checked only when a customer is reapplying for the same measure, they were INC or DNQ for.
G. If applicable: EA Referred = Not something we use right now
H. **IMPORTANT:** If the application is **NOT** for a solar thermal water heater measure, you **MUST** select **NO** for "Solar Thermal Water Heating Participant?"



**Solar Thermal Water Heating Participant?
No

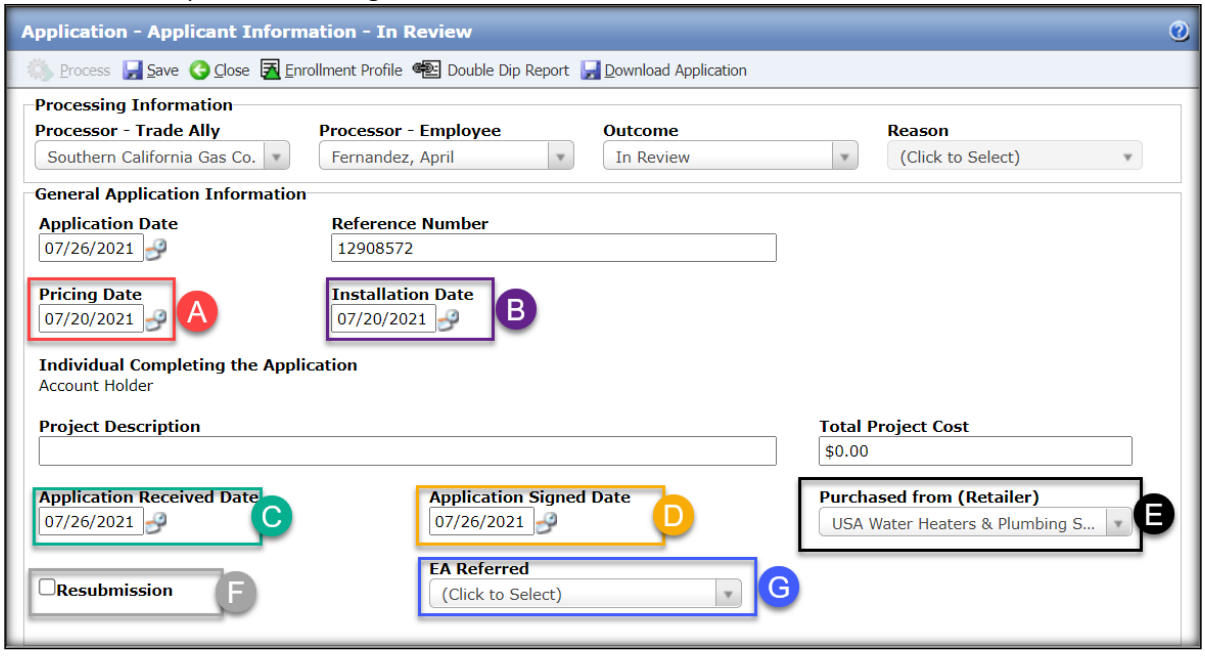
H

- If the application **IS FOR** a solar thermal water heater measure, you will be able to tell by the following key items:
 a. It will state **"2 – RES_Residential Energy Efficiency Program" Mobile Application** in the Workflow Step Summary on the left-hand side.
 b. The "Incentive" under Workflow Step Costs will be $3,500 or more.

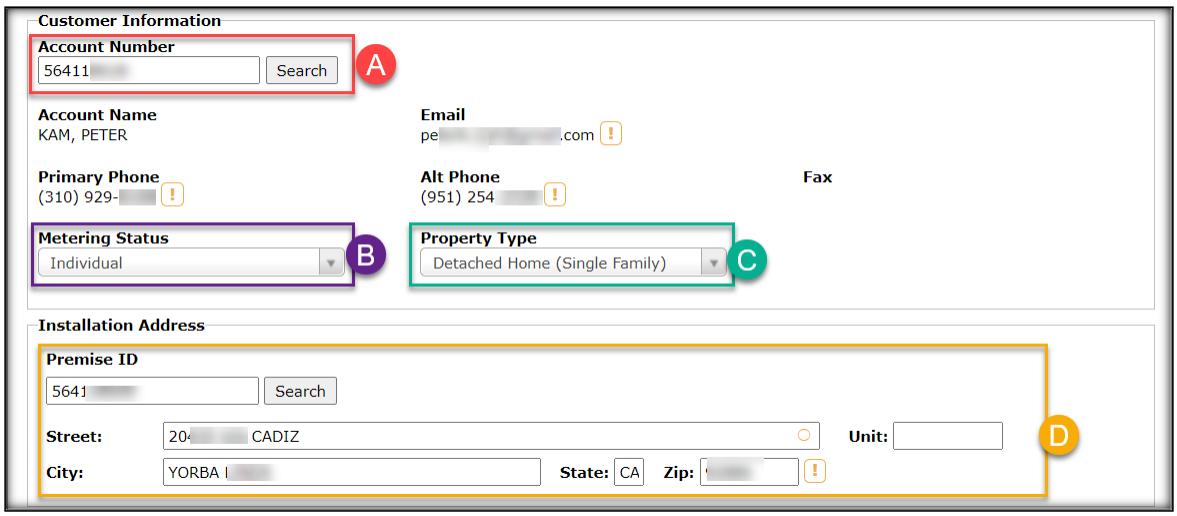


If you see these items, please review the Solar Thermal Water Heater section on how to proceed.

Below is the completed **Processing Information Section**.

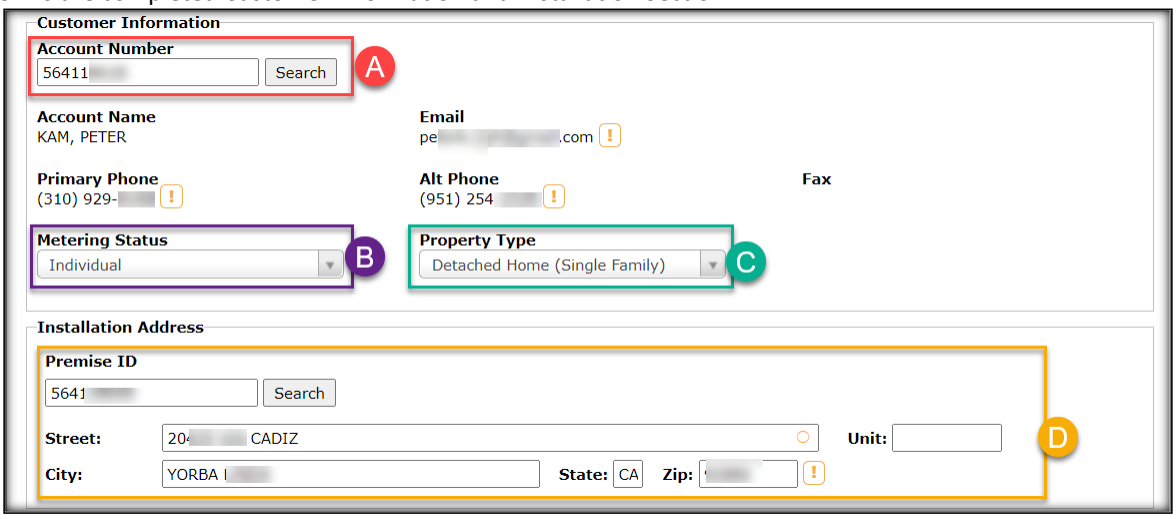


CUSTOMER INFORMATION AND INSTALLATION SECTION



16. There are only 3 fields in the Customer Information Section that are editable that is the: Account Number, Metering Status, Property Type.
 A. Account Number = Will not be edited
 B. Metering Status = Check what customer has entered
 - Default to Individual if customer chose something else or it is blank
 C. Property Type = Check what customer has entered and leave as is
 - Default to Detached Home (Single Family) ONLY if customer left it blank
 D. Installation Address = Will not be edited

Below is the completed Customer Information and Installation Section



Note: The ! means the customer entered or changed information that is different from what was in EECP.

APPLICANT INFORMATION, MAILING ADDRESS, PROPERTY INFORMATION SECTION

17. You will leave what the customer has entered for their Applicant Information, Mailing Address, and ONLY edit Property Information if necessary

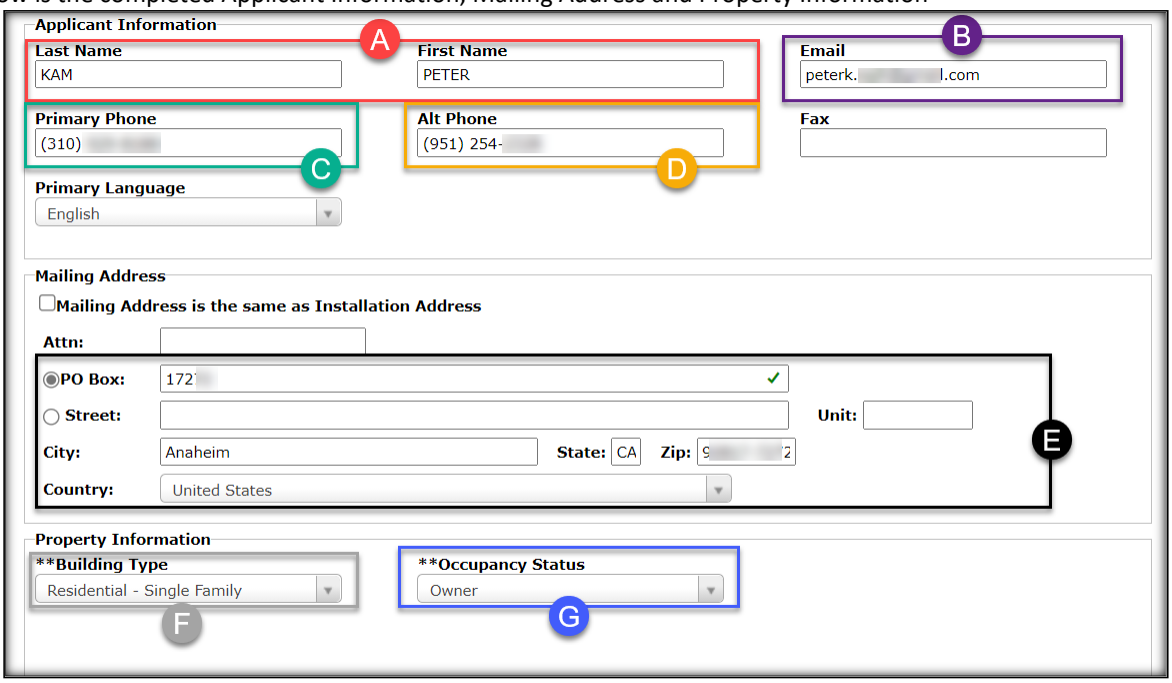
A. **First Name and Last Name** = Verify applicant is the COR or is on the account in CIS, property owner with proof of property ownership
 - If applicant is **NOT** on the account, but one of the following matches the COR information:
 - Last name
 - Phone number
 - Email

 - It is okay to proceed with the enrollment. **[Enter a note stating what piece of information matched the - COR]**
 - If one of the above **DOES NOT** match it will be INC and the COR asked to reapply.

B. **Email** = If customer did not enter anything, okay to proceed
C. **Primary Phone** = If customer did not enter anything, okay to proceed
D. **Alt Phone** = If customer did not enter anything, okay to proceed
E. **Mailing Address** = Leave as is, as the customer has verified this information to be their mailing address
F. **Building Type** = Verify the customer chose Residential - Single Family
 - If blank, default to Residential - Single Family
 - Residential Mobile Home is only used for GS Rate Code

G. **Occupancy Status** = Leave what the customer has entered
 - If blank, default to Owner

Below is the completed Applicant Information, Mailing Address and Property Information



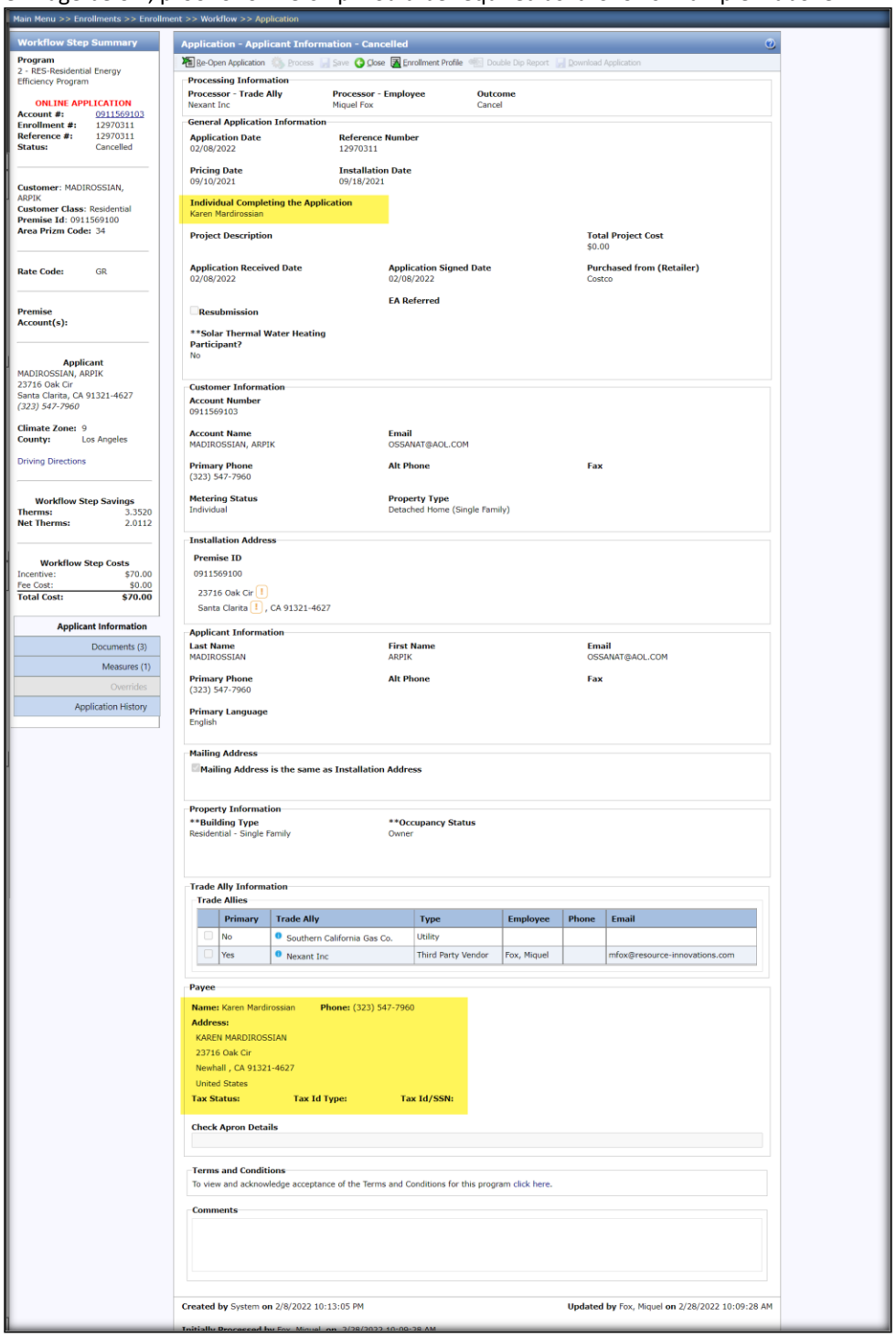
PAYEE SECTION

18. The Payee section of the Online Application should be questioned if it is going to someone other than the account holder. If the payee is the same as the account holder proceed to Step 19. If the payee is someone other than the account holder. Follow the steps below:
 A. If the "Individual Completing the Application" does not match the COR and the check is payable to someone other than the COR, we need to ask for proof of ownership unless the Individual Completing the Application is the Spouse authorized in CIS.
 - Example #1
 - COR= Jose Hernandez
 - Individual completing Application = Maria Torres

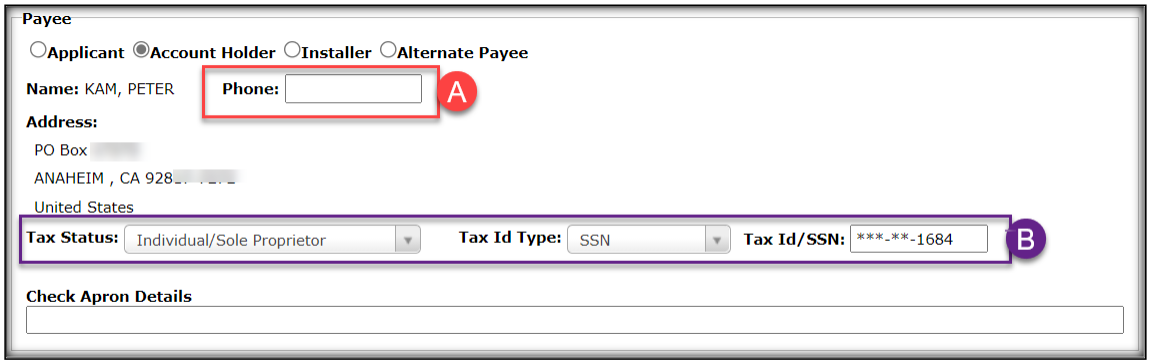
- Payee = Maria Torres
- Not listed as spouse in CIS, need to ask for proof of ownership

- Example #2
 - COR= Jose Hernande
 - Individual completing Application = Maria Torres
 - Payee= Jose Hernandez
 - Because the Payee = COR, no need to ask for proof of ownership or verify CIS. Ok to process

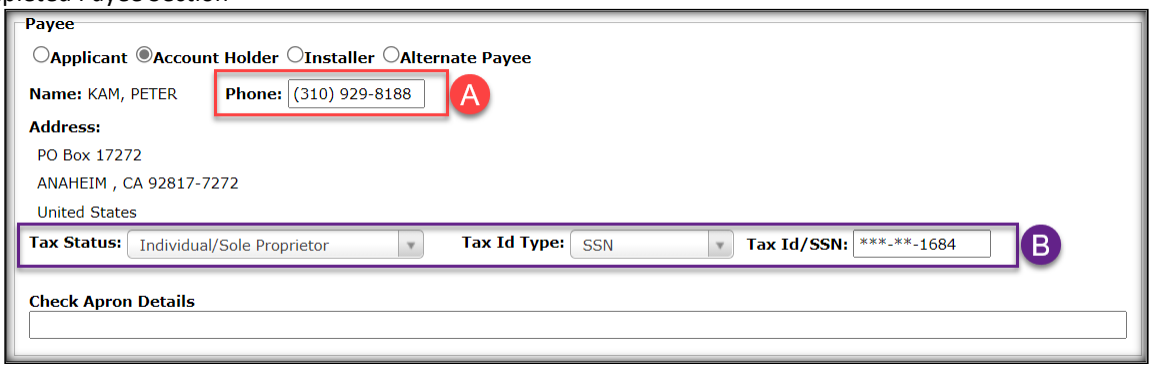
B. In the image below, proof of ownership would be required as it follows Example 1 above.



19. We will not edit this section; we will just verify that all required information is entered.
 A. If the phone number is blank enter the **Primary Phone** number entered by the customer in the Applicant Information section.
 B. **Tax Information** = ALWAYS required if check is going to someone other than the account holder.
 - **Tax Status** – Leave what customer has entered
 - Default to Individual/Sole Proprietor if provided an SSN and customer leaves it blank
 - Default to Corporation if provided an EIN and customer leaves it blank
 - **Tax Id Type** – If the numbers are written
 - XXX-XX-XXXX this is an SSN, choose if customer leaves it blank
 - XX-XXXXXXX this is an EIN, choose if customer leaves it blank
 - **Tax Id/SSN** – Leave what customer has entered
 - We **MUST** have all 3 to proceed if customer does not provide EIN/SSN and it goes to an alternate payee we **MUST** INC the customer and ask them to provide it.
 - If anything is missing and the payee is the account holder it is okay to erase what was entered if the EIN/SSN was not provided



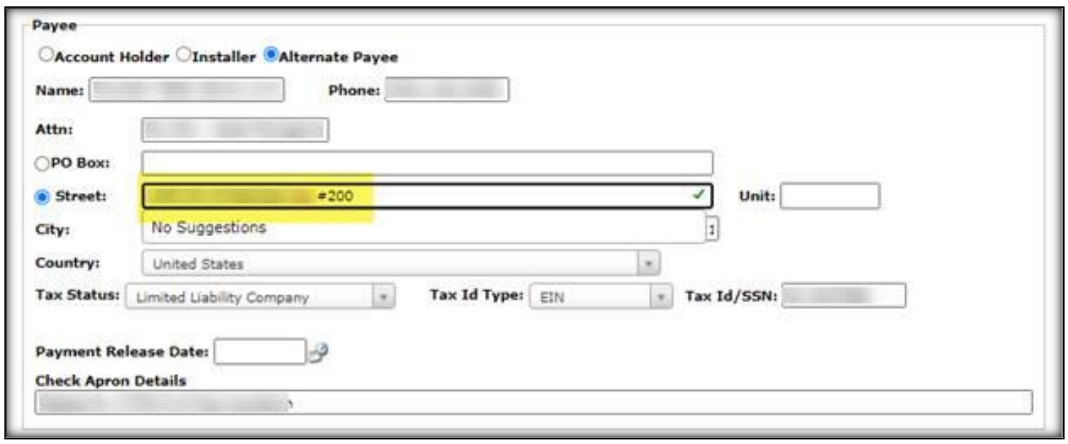
Completed Payee Section



Payee Address Length Notification

The system allows 35 characters in the Payee section due to the way SAP formats the payment. When you use the "Unit" text box, SAP adds 2 additional spaces as well as 'Unit:'. The issue with accepting the warning and not reducing the characters in the address is that SAP will cut the check, but digits will be left out of the payee address. As a workaround, the processor **MUST** enter the unit number within the address text box instead of the unit text box as shown below.

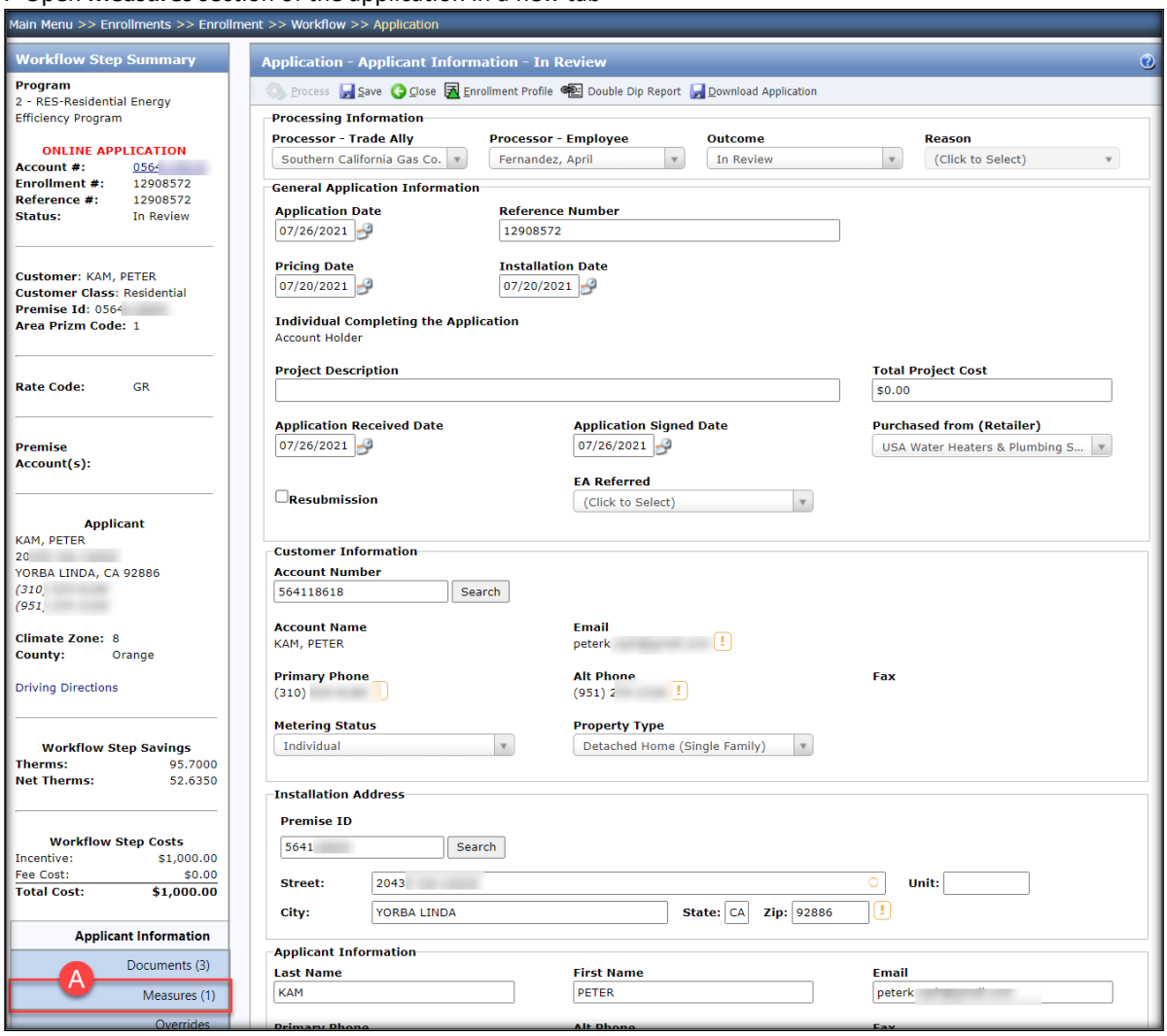
Important: After you enter the address (before you click out of the Street textbox) navigate to the top of the application and click "Save". The only way to ensure the system doesn't move the unit number back into the "Unit" text box, you **MUST** save as instructed above.



NOTE: Checks cannot go to an address outside of the United States.

MEASURE SECTION

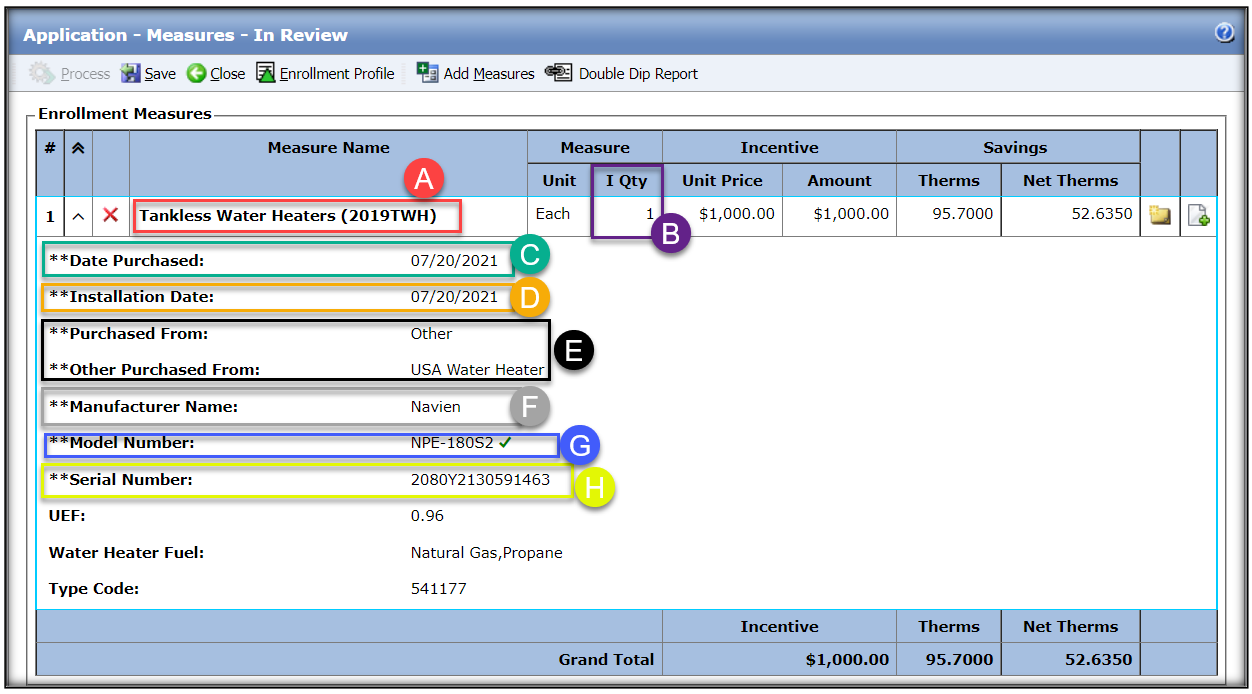
19. Open **Measures** section of the application in a new tab

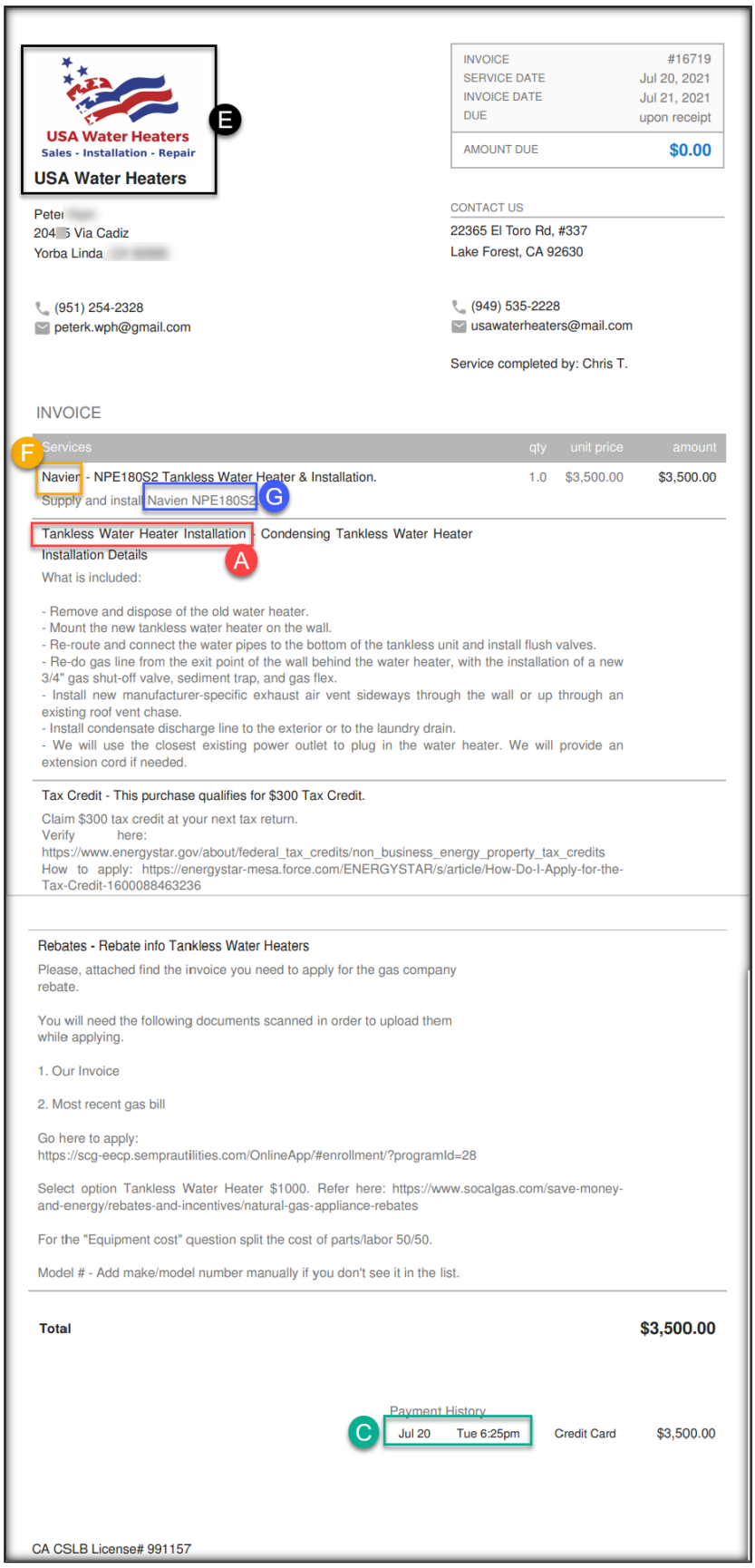


20. Once the **Measures** Tab is open
 A. **Verify** that the measure chosen by the customer matches their receipt/invoice.
 B. **Verify Measure I Qty** = 1
 - If the customer is applying for 2 of the same measure, NEVER enter QTY 2. Instead add 2 separate line items.
 - If a customer applies for 2 or more of the same measure it will require a virtual inspection. Please go to Inspections section for more information.
 - If customer's invoice shows multiple units of the same measure purchased and they **DO** qualify, processor will reach out to customer to confirm the quantity they are applying for if measure is not seen in Double Dip in another enrollment. **[Nexant will place on Team Lead Review]**
 C. **Verify Date Purchased** = Is the same date used for "Pricing Date" on Application, change if needed
 D. **Verify Installation Date** = Is the same date used for "Installation Date" on Application, change if needed
 E. **Verify Purchased From** = Is where the receipt/invoice is purchased from, change if needed
 - If not on the list, select "Other" and type it in
 F. **Verify Manufacturer Name** = Is the manufacturer provided on the receipt/invoice, change if needed
 G. **Verify Model Number** = Is the model number provided on the receipt/invoice, change if needed
 H. **Verify Serial Number** = For TWH ONLY verify there is a serial number entered.
 - For all other measures the Serial Number is not a required field in EECP.
 - If customer provides a picture of the Serial Number from the box, sticker or model plate ensure what was entered matches the image provided. Make changes if necessary.
 - The serial number does not need to be on the receipt/invoice, but if it is verify it matches what was entered in EECP. Make changes to reflect invoice if necessary.
 - In cases where the serial number on the invoice and the picture the customer provided (seen on sticker, box, equipment) **DOES NOT MATCH**, processor can update EECP with correct serial # from the picture since we know it is accurate and add note stating why they updated. **No updated invoice or geotagged photo is necessary.**

Any line item that does not have a ** is an optional field and the customer will not be penalized if they do not have those items.

If you do not have the information for fields with ** the enrollment will be INC and cancelled and the appropriate email/letter will be sent so the customer can reapply.


Application - Measures - In Review
Process
Save
Close
Enrollment Profile
Add Measures
Double Dip Report
Enrollment Measures
| Measure Name | Measure | Incentive | Savings
Unit | I Qty | Unit Price | Amount | Therms | Net Therms
1 | Tankless Water Heaters (2019TWH) | Each | 1 | $1,000.00 | $1,000.00 | 95.7000 | 52.6350
A
B
**Date Purchased: 07/20/2021
C
**Installation Date: 07/20/2021
D
**Purchased From: Other
**Other Purchased From: USA Water Heater
E
**Manufacturer Name: Navien
F
**Model Number: NPE-180S2 ✓
G
**Serial Number: 2080Y2130591463
H
UEF: 0.96
Water Heater Fuel: Natural Gas,Propane
Type Code: 541177
Incentive | Therms | Net Therms
Grand Total | $1,000.00 | 95.7000 | 52.6350



USA Water Heaters
Sales - Installation - Repair
USA Water Heaters

E

INVOICE	#16719
SERVICE DATE	Jul 20, 2021
INVOICE DATE	Jul 21, 2021
DUE	upon receipt
AMOUNT DUE	$0.00

Peter
204[illegible]5 Via Cadiz
Yorba Linda [illegible]

(951) 254-2328
peterk.wph@gmail.com

CONTACT US
22365 El Toro Rd, #337
Lake Forest, CA 92630

(949) 535-2228
usawaterheaters@mail.com

Service completed by: Chris T.

INVOICE

Services	qty	unit price	amount
Navien - NPE180S2 Tankless Water Heater & Installation.	1.0	$3,500.00	$3,500.00

F

Supply and install Navien NPE180S2 G

Tankless Water Heater Installation - Condensing Tankless Water Heater
Installation Details
What is included:

A

- Remove and dispose of the old water heater.
- Mount the new tankless water heater on the wall.
- Re-route and connect the water pipes to the bottom of the tankless unit and install flush valves.
- Re-do gas line from the exit point of the wall behind the water heater, with the installation of a new 3/4" gas shut-off valve, sediment trap, and gas flex.
- Install new manufacturer-specific exhaust air vent sideways through the wall or up through an existing roof vent chase.
- Install condensate discharge line to the exterior or to the laundry drain.
- We will use the closest existing power outlet to plug in the water heater. We will provide an extension cord if needed.

Tax Credit - This purchase qualifies for $300 Tax Credit.

Claim $300 tax credit at your next tax return.
Verify here:
https://www.energystar.gov/about/federal_tax_credits/non_business_energy_property_tax_credits
How to apply: https://energystar-mesa.force.com/ENERGYSTAR/s/article/How-Do-I-Apply-for-the-Tax-Credit-1600088463236

Rebates - Rebate info Tankless Water Heaters

Please, attached find the invoice you need to apply for the gas company rebate.

You will need the following documents scanned in order to upload them while applying.

1. Our Invoice

2. Most recent gas bill

Go here to apply:
https://scg-eecp.semprautilities.com/OnlineApp/#enrollment/?programId=28

Select option Tankless Water Heater $1000. Refer here: https://www.socalgas.com/save-money-and-energy/rebates-and-incentives/natural-gas-appliance-rebates

For the "Equipment cost" question split the cost of parts/labor 50/50.

Model # - Add make/model number manually if you don't see it in the list.

Total **$3,500.00**

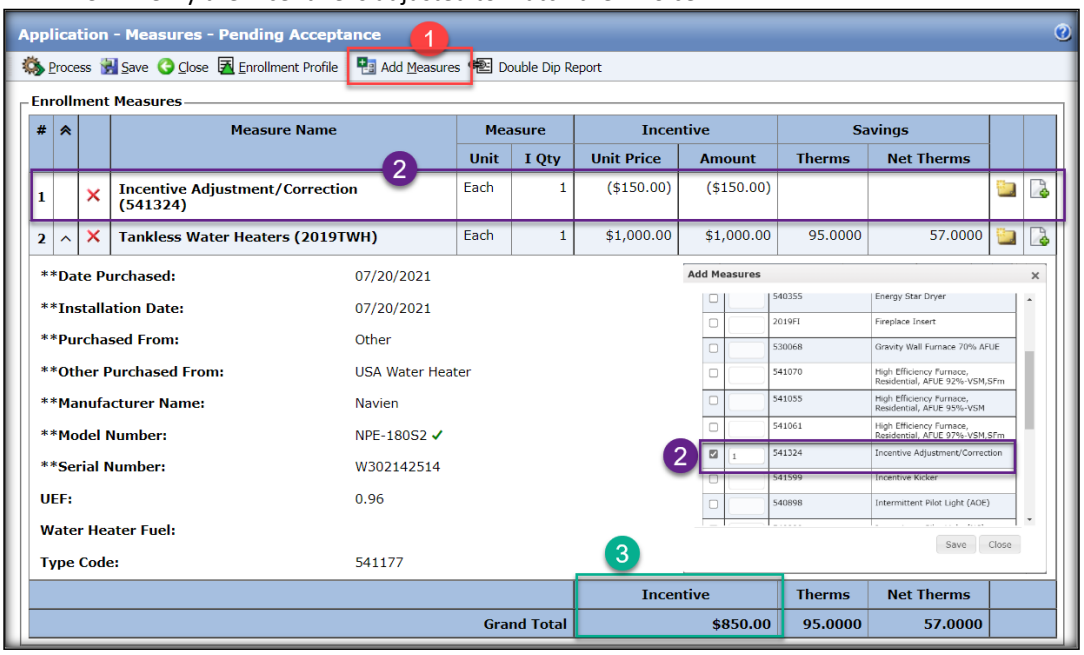
Payment History

C

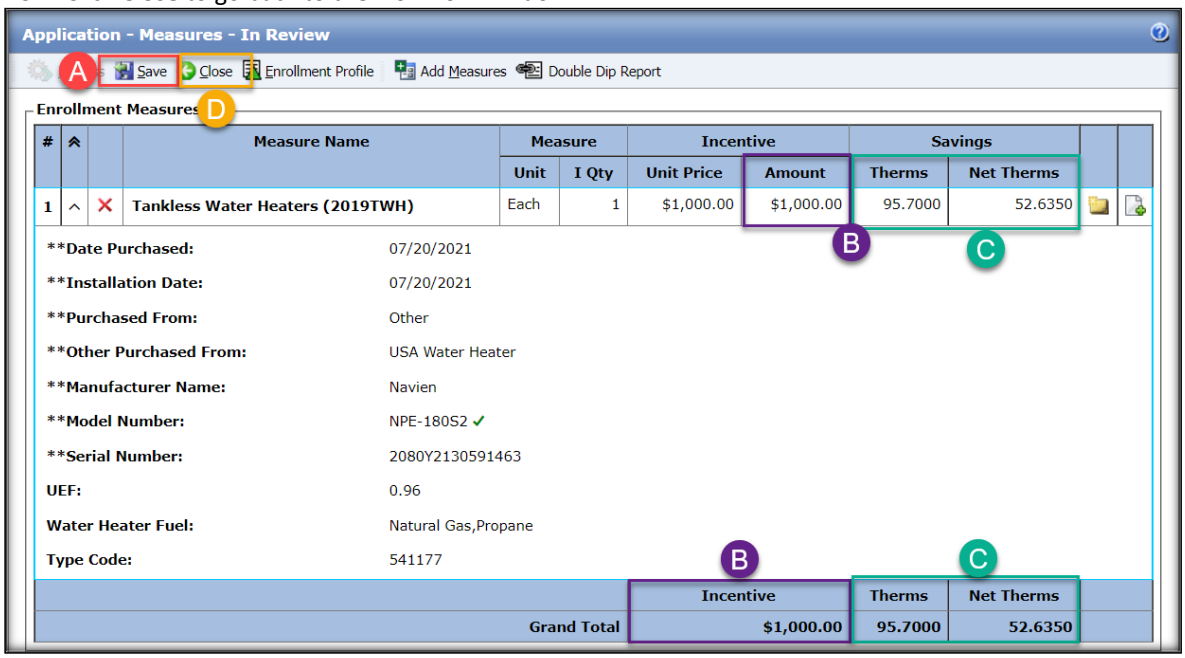
Jul 20	Tue 6:25pm	Credit Card	$3,500.00

CA CSLB License# 991157

21. Once all information is entered the page will look as follows.
 A. Verify the incentive amount is populating the current incentive based off the current program offerings.
 - **IMPORTANT:** If the customer paid less than the incentive, you will use the "Incentive Adjustment/Correction" measure to lower the incentive up to the purchase price of the unit, not including additional charges such as shipping or taxes.
 1. Click on "Add Measure"
 2. Add the "Incentive Adjustment/Correction" and enter the amount to adjust the incentive based off on the purchase price on the invoice pretax.
 3. Verify the Incentive is adjusted to match the invoice

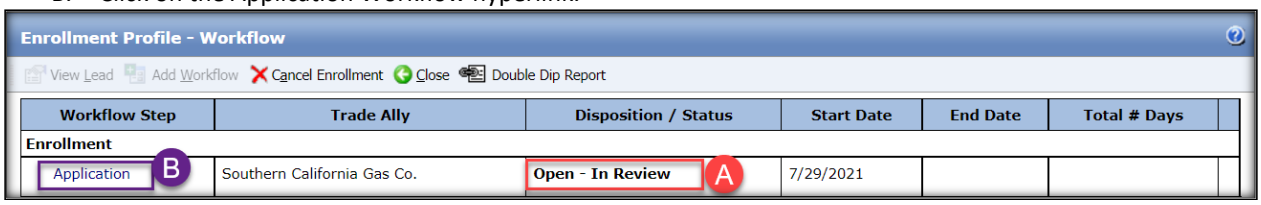


 B. Verify the therm savings is populating.
 C. Click **Close** to go back to the workflow window.

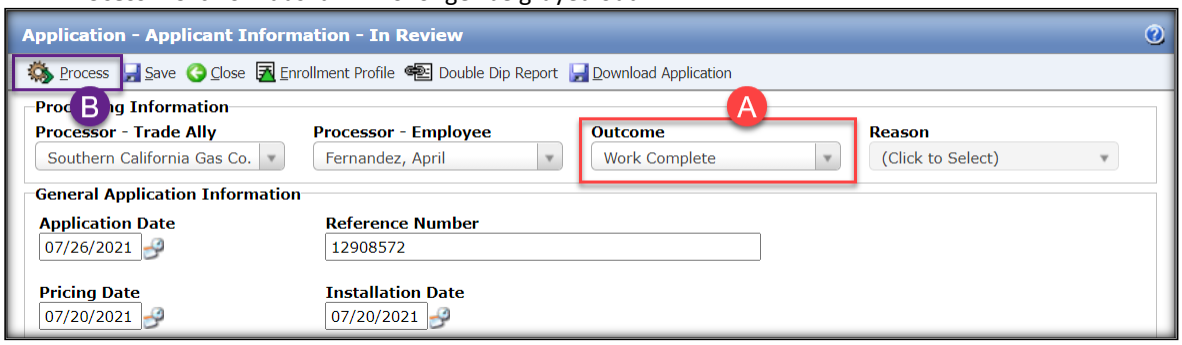


22. After clicking on "Close" you will be redirected to the Enrollment Profile – Workflow.

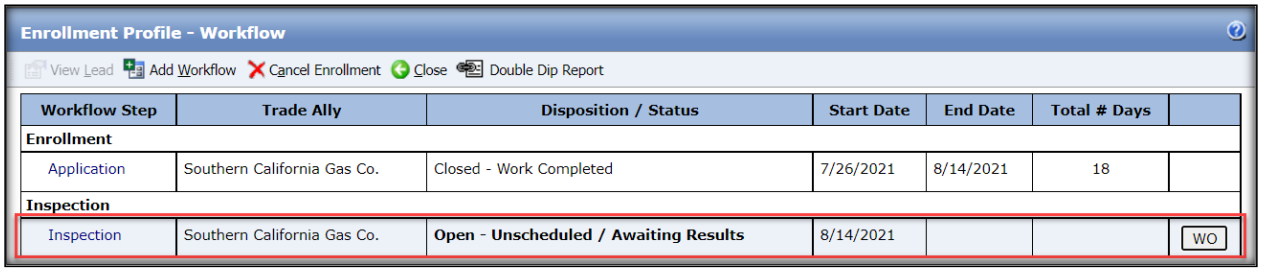
A. Application Status will be Open-In Review.
B. Click on the Application Workflow hyperlink.



23. When you are back in the Application you will change the Outcome so you can process.
 A. **Outcome** = Change to Work Complete
 B. **Process** = Click on it as it will no longer be grayed out

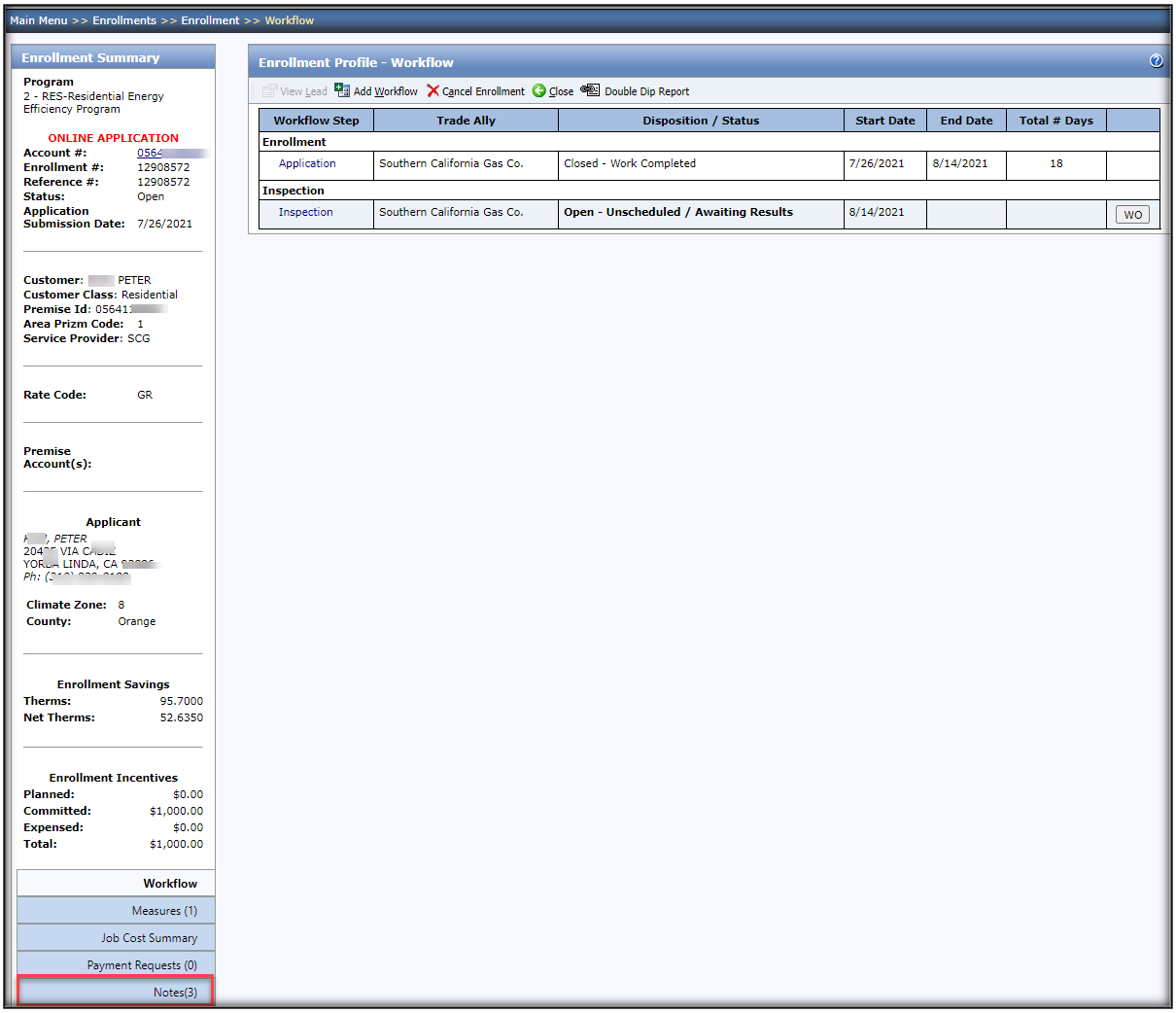


24. EECP directs the processor to the following screen. The Application Workflow "Disposition/Status" is displayed as "Closed – Work Completed" once processed. The processor will see 1 of 3 different workflows: Inspections, QA Review, or Initiate Payment displayed underneath the Application Workflow. Please ensure one of the workflows has kicked off. *****IMPORTANT: If no workflow has kicked off, please notify Processing and QA Team Lead IMMEDIATELY**

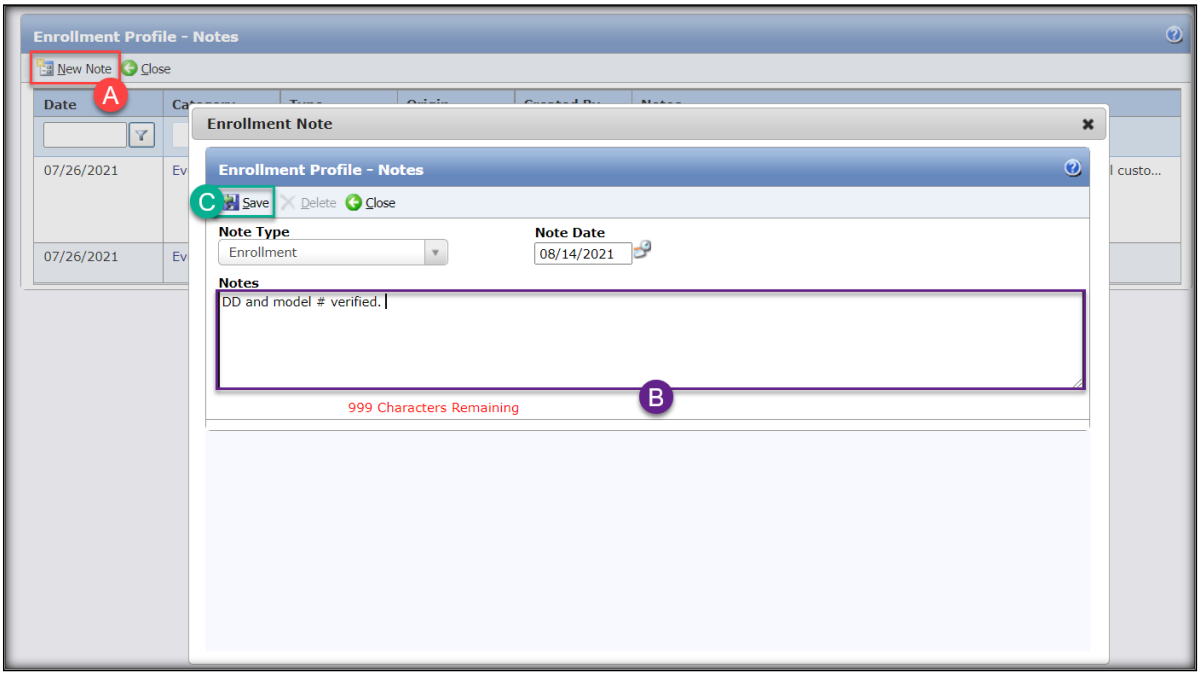


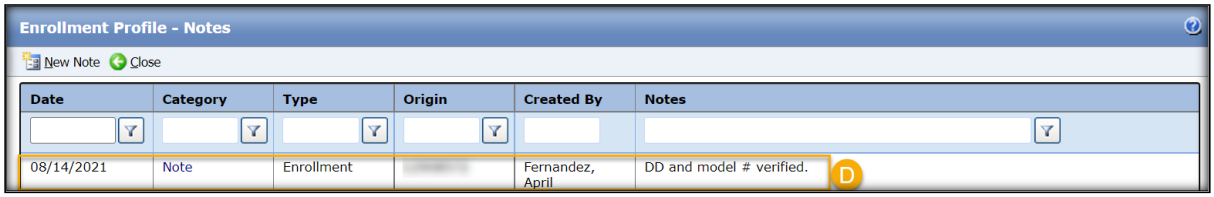
NOTES SECTION

25. The last step will be to enter a **Note** in Notes Section of the Enrollment Profile



26. You will then be directed to the Enrollment Profile – Notes:
 A. Click on “New Note” and a new window will popup
 B. Always enter a note “DD and model # verified” to verify you have checked the double dip and you have verified the model # qualifies.
 - You will also enter a note anytime you deviate from Standard Processing Procedures, go to the Notes question in in the FAQ of the Appendix.
 C. Click on “Save” to save your note.
 D. Your completed note will save to the enrollment.





The enrollment is now complete.

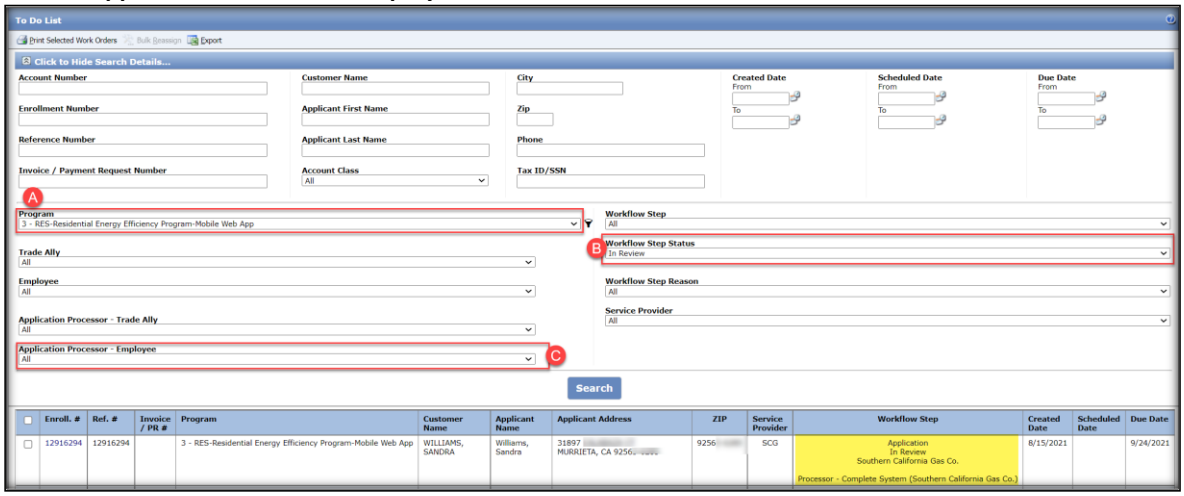
If for any reason the enrollment deviates from the standard procedures or it is an INC or DNQ, ensure your note also includes that information in the notes.

If the enrollment is unable to be processed due to any missing information or the equipment the customer applied for is a DNQ, please refer to Manually Generated Emails and Letters in the Appendix on the appropriate email/letter to send.

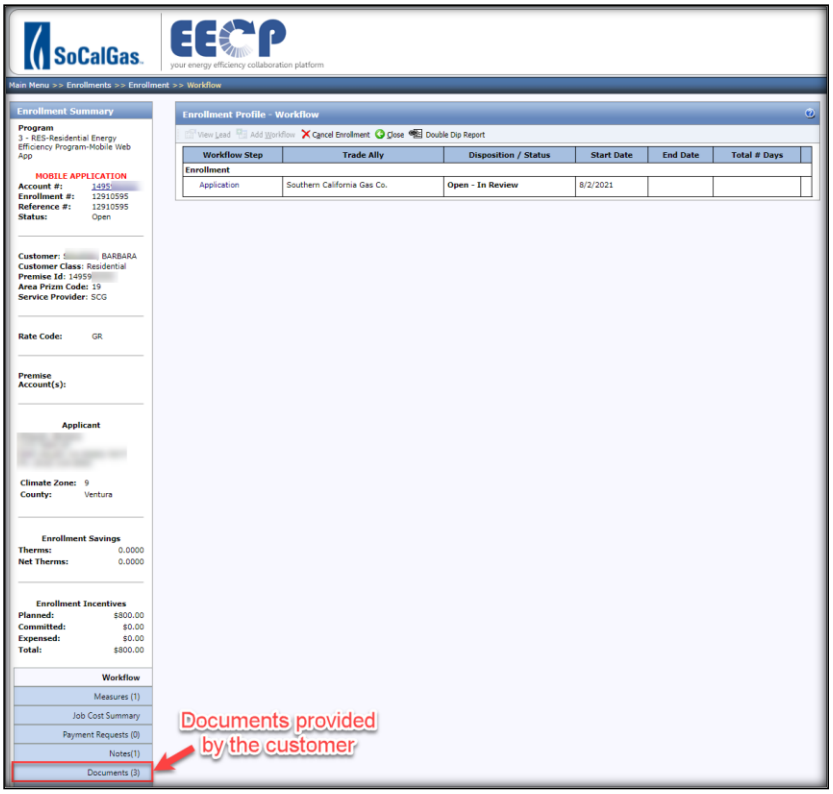
MOBILE APPLICATION

The below is a step-by-step process on how to process a Mobile Application.

1. Enrollments can be found by navigating your To Do List.
 A. **Program** = 3 – RES-Residential Energy Efficiency Program-Mobile Web App
 B. **Workflow Step Status** = In Review
 C. **Application Processor – Employee** = Your name or All

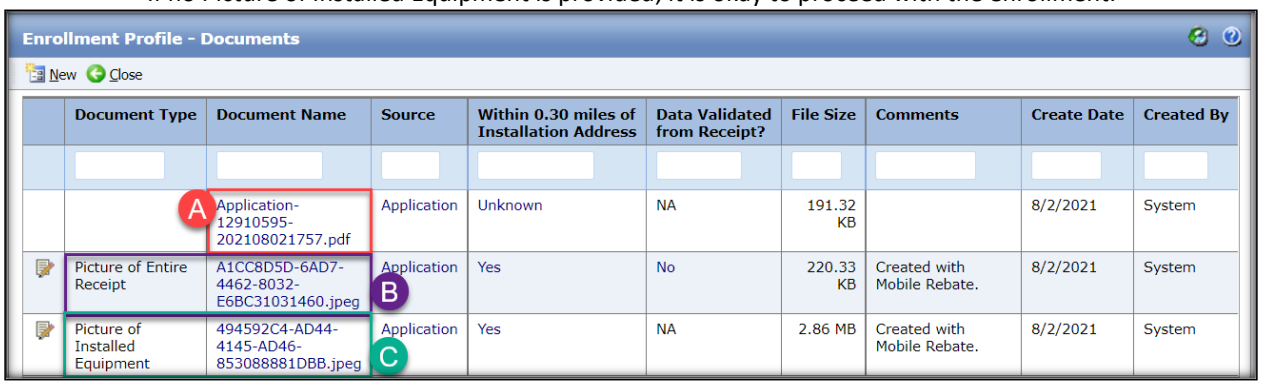


2. When enrollment hyperlink is clicked from the To-Do List, the user will be re-directed to the enrollment. The customer has uploaded all necessary documents into the documents sub menu section of the enrollment.

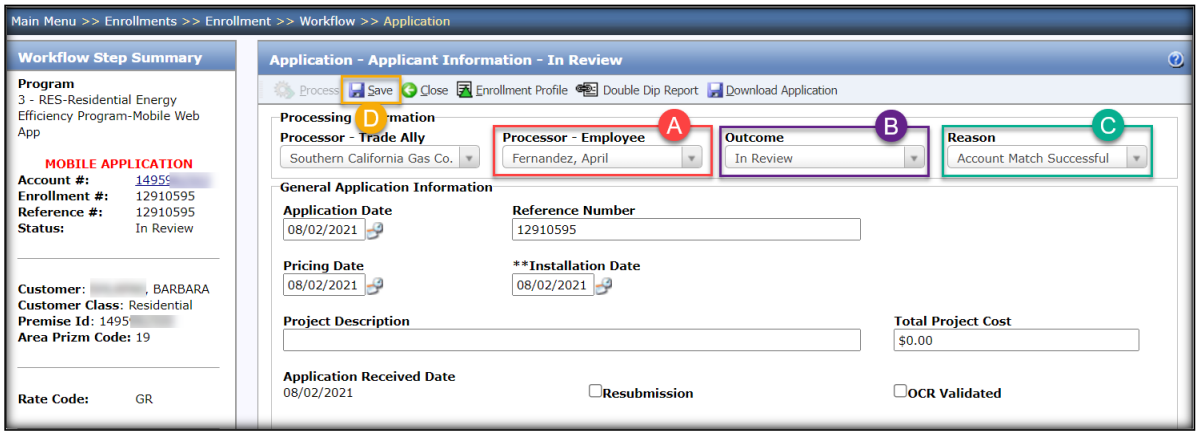


3. Click on the **Document folder** and you will be redirected to the image below. You will see several documents depending on what the customer has uploaded.

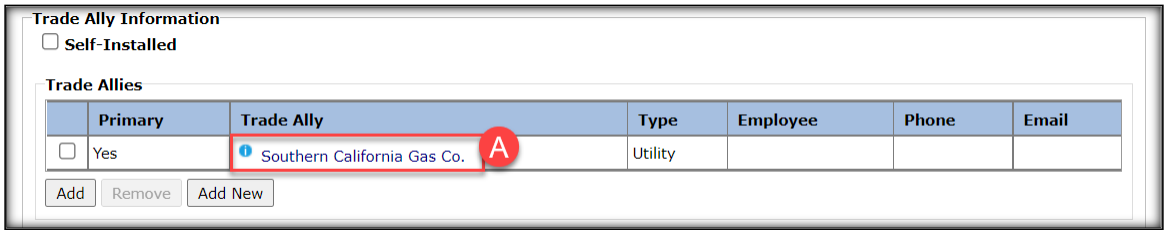
A. The Application document is auto generated by the system, and you do not need to open. If the "Application" is not there, please notify the Team Leads.
B. **Picture of Entire Receipt** = Required field and customer will have uploaded a document
C. **Picture of Installed Equipment** = Required field and customer will have uploaded a document
 - If no Picture of Installed Equipment is provided, it is okay to proceed with the enrollment.

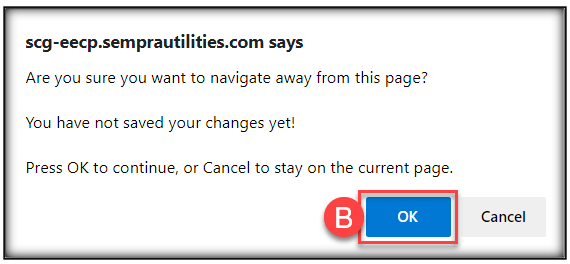


4. Go back to the **Enrollment Application Workflow**. Ensure the following is done:
 A. **Processor – Employee** = Your name
 B. **Outcome** = In Review (this will gray out the process button and prevent you from processing prematurely)
 C. **Reason** = Account Match Successful (Reason is needed in order to Save)
 D. **Click on "Save"**

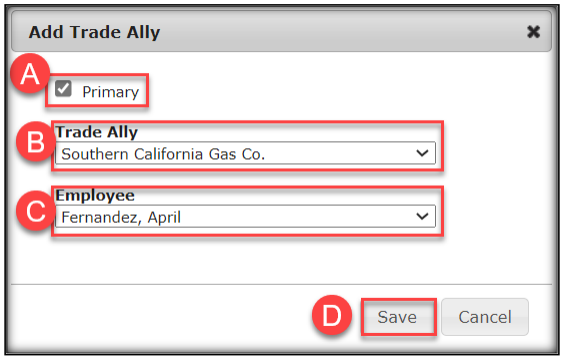


5. Scroll down to the **Trade Ally Information** section.
 A. Select **Southern California Gas Co.** hyperlink to add your name in the Trade Ally Information and an alert will popup.
 B. Click on the **OK** button.

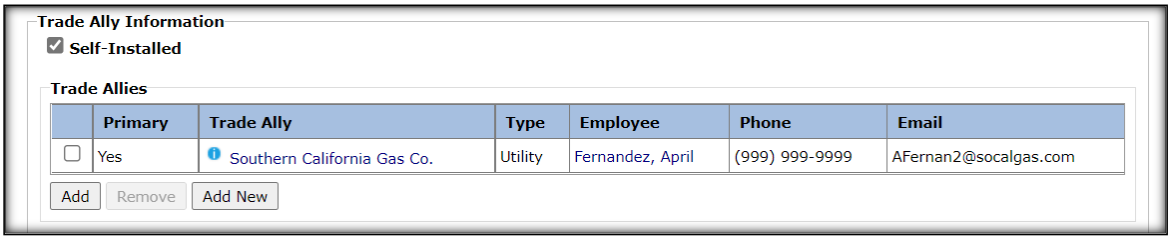




8. Once you see the "Add Trade Ally" window, do the following:
 A. **Primary** = Click on the box
 B. **Trade Ally** = Select Southern California Gas Co. from dropdown
 C. **Employee** = Select Your Name from dropdown
 D. **Click on "Save"**



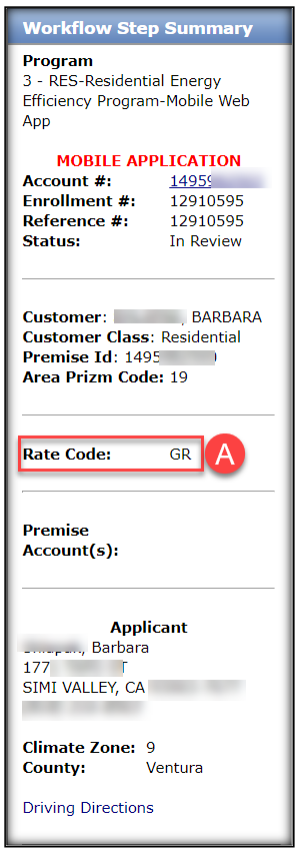
9. Once you click on **Save**, ensure the Trade Ally and your name is captured. It will look like the image below:



VERIFYING THE ACCOUNT AND DOCUMENTS

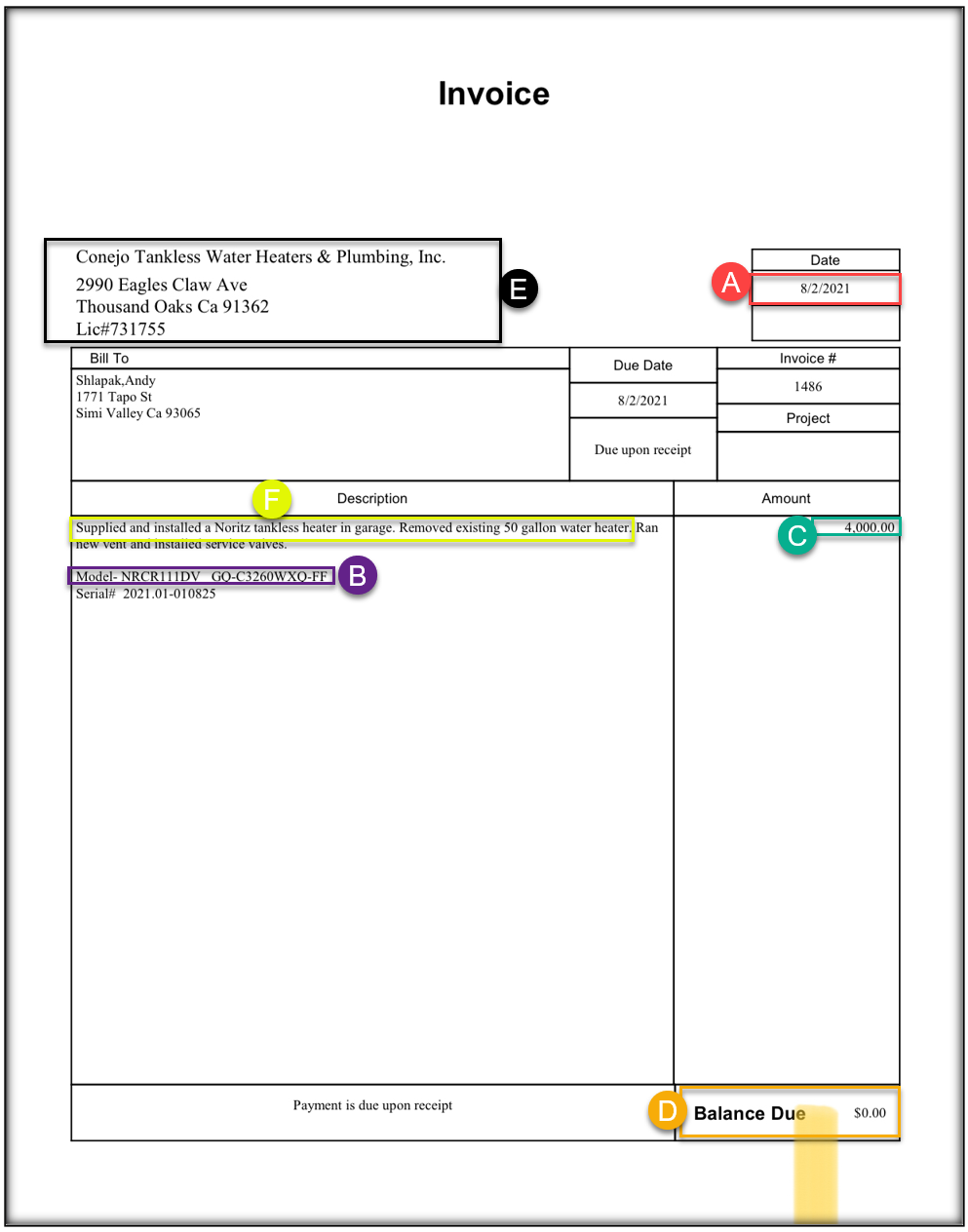
10. Next verify the customers Rate Code on the left under the Workflow Step Summary.
 A. Ensure it has the one of the following: GR, GR1, GRC, and GT-R, if the customer does not qualify, processor will DNQ the enrollment and send a letter/email to customer. *Please reference the Manually Generated Emails/Letters section in the Appendix.

For any other rate codes please refer to the Rate Code section above.



11. Next verify the measure's make/model specifications qualify for the incentive by locating their invoice/receipt. The invoice **MUST** have the following to proceed with the enrollment.
 A. Purchase date
 B. Model number
 C. Price of equipment or total price (there needs to be at least one)
 D. Method of payment
 E. Retailer/vendor information
 - If receipt is from Retailer, Retailer name only is sufficient
 - If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:
 - Contractor name and phone number
 - Contractor name and address
 - Contractor name and email
 F. For TWH **ONLY**, make sure the description **DOES NOT** state the customer previously had a TWH and replaced with another TWH as this would be an automatic DNQ. Per the application, the customer **MUST** be replacing a conventional tank type water heater.

If anything from above is missing you will send an INC email/letter allowing them to reapply or if the measure does not qualify you will send a DNQ email/letter stating, they did not qualify and why.



Invoice

Conejo Tankless Water Heaters & Plumbing, Inc.
2990 Eagles Claw Ave
Thousand Oaks Ca 91362
Lic#731755

E

A

Date
8/2/2021

Bill To
Shlapak,Andy
1771 Tapo St
Simi Valley Ca 93065

Due Date
8/2/2021

Due upon receipt

Invoice #
1486

Project

F

Description

Amount

Supplied and installed a Noritz tankless heater in garage. Removed existing 50 gallon water heater. Ran new vent and installed service valves.

C
4,000.00

Model- NRCR111DV GQ-C3260WXQ-FF
Serial# 2021.01-010825

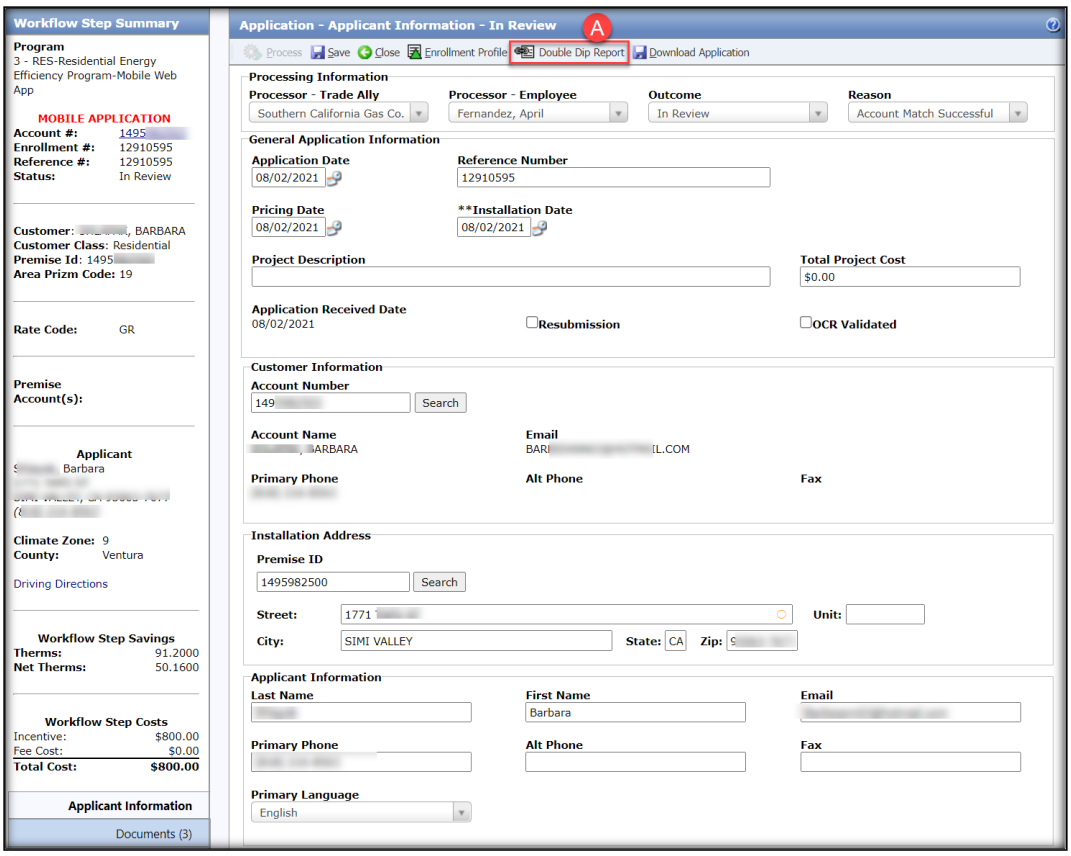
B

Payment is due upon receipt

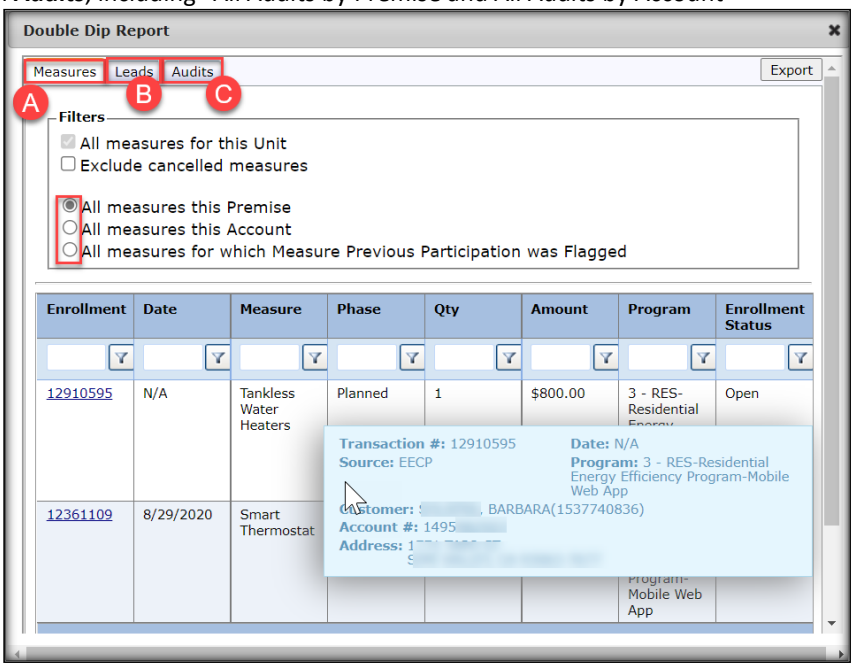
D
Balance Due $0.00

Once you have verified their equipment qualifies for the rebate and you have the 5 items above you can proceed with the application.

12. **ALWAYS** verify the Double Dip to ensure we are not paying the customer for something they already received a rebate for within the past 5 years. For more information on **Double Dip**, please reference it above. *IMPORTANT: There are times when customers apply for a rebate however the exact 5 years have not passed. It is okay to proceed with the application as you can go by the year of submission and not the exact date.
 A. Click on **Double Dip**.



13. Once you have clicked on the **Double Dip**, do the following:
 A. Click on **Measures**, including "All measures this Premise, All measures this Account, and All measures for which Measure Previous Participation was Flagged"
 B. Click on **Leads**, including "All Leads by Premise and All Leads by Account"
 C. Click on **Audits**, including "All Audits by Premise and All Audits by Account"

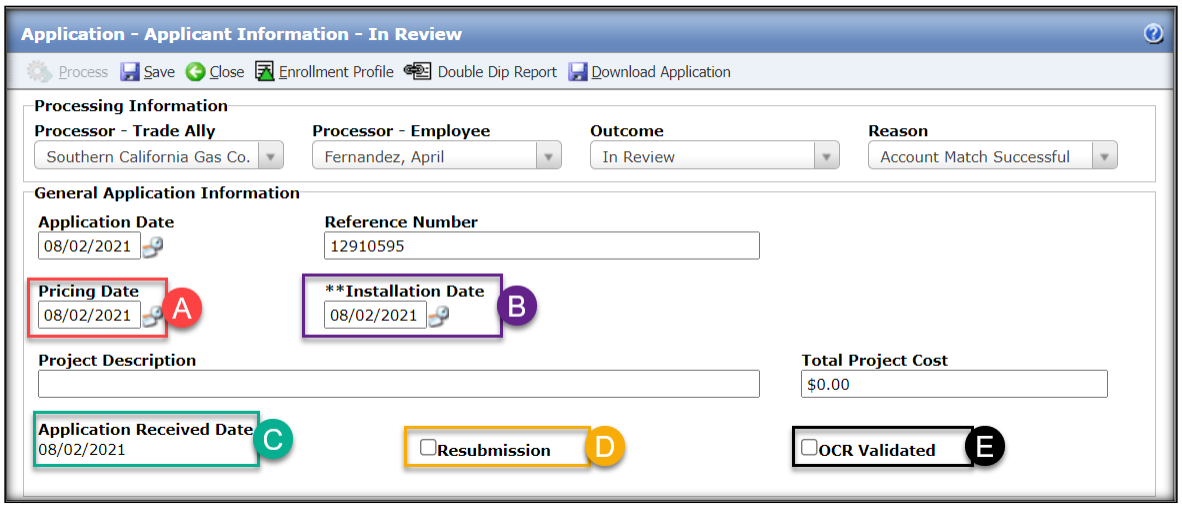


When you have verified the customer has no previous DD for the same measure, you can continue to review what the customer has entered in EECP.

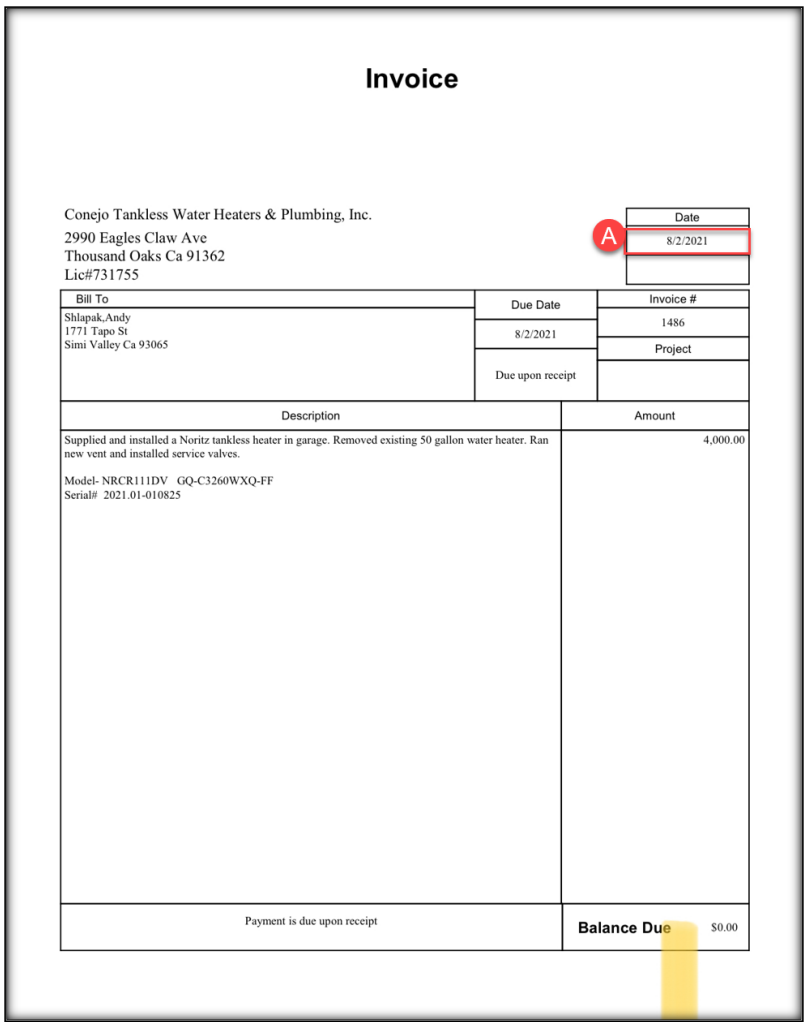
For the next steps, all information will be reviewed to ensure it matches what is on the receipt/invoice.

PROCESSING INFORMATION SECTION

The fields below are what you will need to fill out and verify what the customer entered is correct:



15. Fields A-C are mandatory, and D-E are only if it applies. Fill out the following fields:
 A. **Pricing Date** = Purchase date taken from receipt/invoice ****Unless otherwise directed by Team Lead due to IO Year. See Pricing Date in Appendix for more information.**
 - If purchased from a retailer such as Best Buy, Home Depot, etc. The purchase date will be the date on the receipt provided to the customer at the time of checkout.
 - If purchased from a store which provides invoices, the purchase date will be the PAID IN FULL, PAID, PAID BY CHECK date. If this information is not provided, then the actual INVOICE DATE will take place as the purchase date.
 - Purchase date shall not be verified verbally by phone or through email; updated invoice documentation is always required.
 - If **NO** purchase date is on the invoice this is an INC and the customer will be asked to reapply in system email/letter.



Invoice

Conejo Tankless Water Heaters & Plumbing, Inc.
2990 Eagles Claw Ave
Thousand Oaks Ca 91362
Lic#731755

A

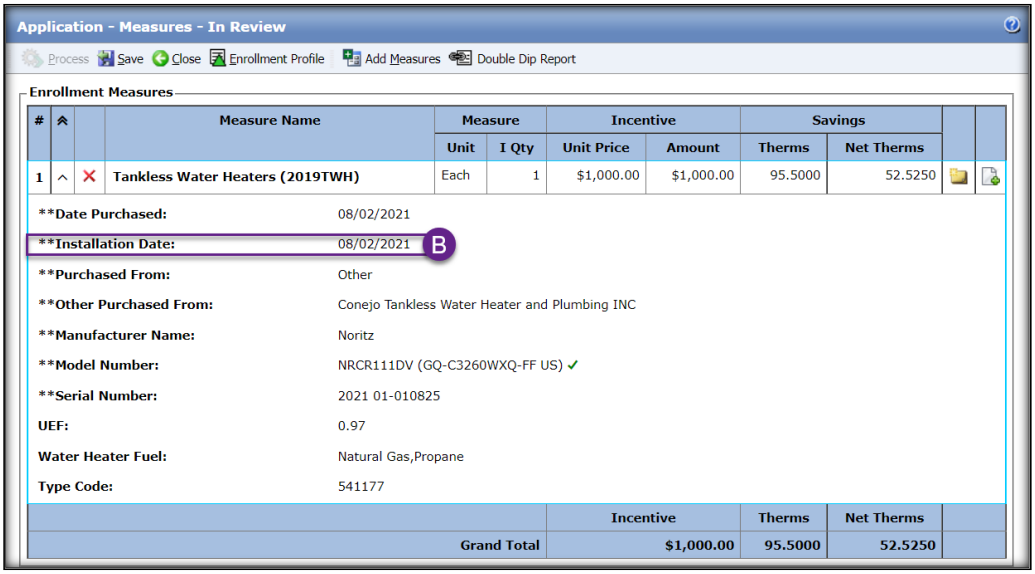
Date
8/2/2021

Bill To	Due Date	Invoice #
Shlapak,Andy 1771 Tapo St Simi Valley Ca 93065	8/2/2021	1486
	Due upon receipt	Project

Description	Amount
Supplied and installed a Noritz tankless heater in garage. Removed existing 50 gallon water heater. Ran new vent and installed service valves. Model- NRCR111DV GQ-C3260WXQ-FF Serial# 2021.01-010825	4,000.00
Payment is due upon receipt	Balance Due $0.00

B. **Installation Date** = Verify a date was entered in the measures subsection.

- If the installation date is after the received date and the date has not passed, the enrollment will be an INC and the appropriate INC email/letter. The customer can reapply once the product has been installed.



Application - Measures - In Review

Process | Save | Close | Enrollment Profile | Add Measures | Double Dip Report

Enrollment Measures

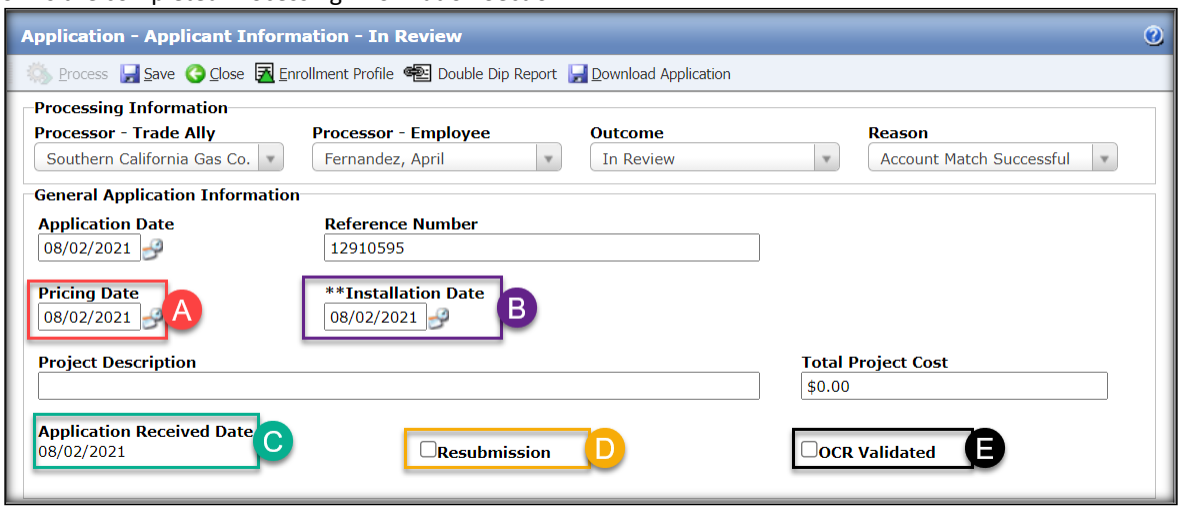
#	Measure Name	Measure		Incentive		Savings	
		Unit	I Qty	Unit Price	Amount	Therms	Net Therms
1	Tankless Water Heaters (2019TWH)	Each	1	$1,000.00	$1,000.00	95.5000	52.5250

**Date Purchased:	08/02/2021
**Installation Date:	08/02/2021 B
**Purchased From:	Other
**Other Purchased From:	Conejo Tankless Water Heater and Plumbing INC
**Manufacturer Name:	Noritz
**Model Number:	NRCR111DV (GQ-C3260WXQ-FF US) ✓
**Serial Number:	2021 01-010825
UEF:	0.97
Water Heater Fuel:	Natural Gas,Propane
Type Code:	541177

	Incentive	Therms	Net Therms
Grand Total	$1,000.00	95.5000	52.5250

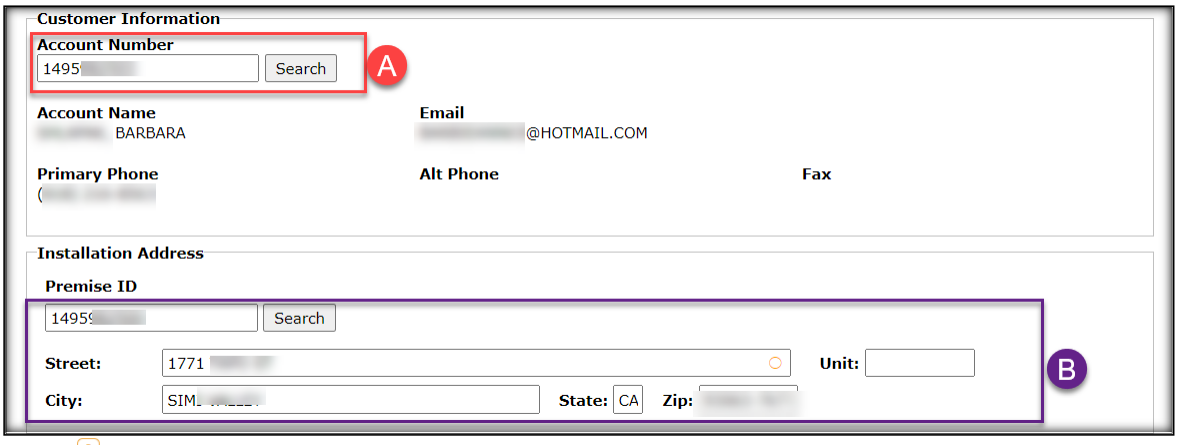
C. **Application Received Date** = Will automatically change when the Pricing Date is updated
D. **If applicable: Resubmission** = Will be checked only when a customer is reapplying for the same measure, they were INC or DNQ for.
E. **If applicable: OCR Validated** = Clicked only when system was able to verify everything in the system

Below is the completed Processing Information Section.



CUSTOMER INFORMATION AND INSTALLATION SECTION

20. The Customer Information and Application Information Section will not be edited.
 A. Account Number = Will not be edited
 B. Installation Address = Will not be edited



Note: The ! means the customer entered or changed information that is different from what was in EECP.

APPLICANT INFORMATION, MAILING ADDRESS, PROPERTY INFORMATION SECTION

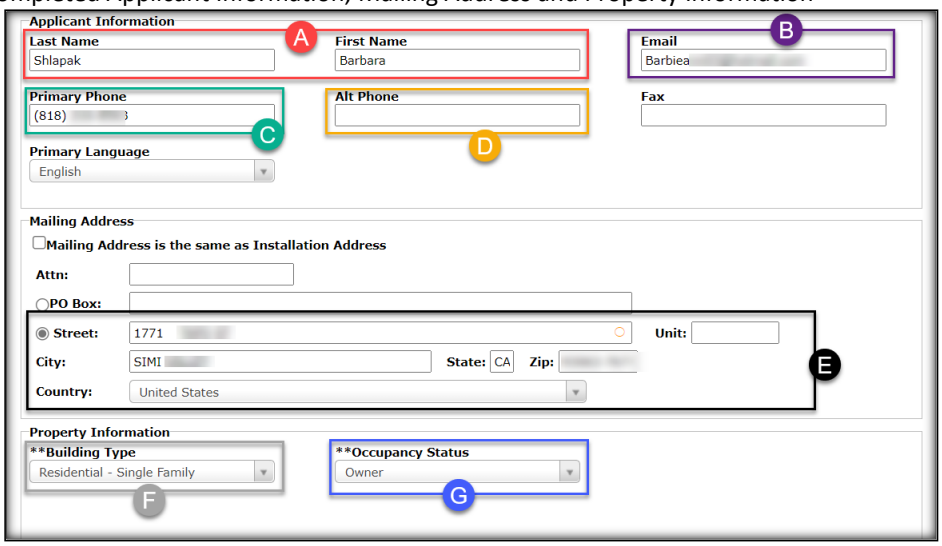
21. You will leave what the customer has entered for their Applicant Information, Mailing Address, and ONLY edit Property Information if necessary
 A. **First Name and Last Name** = Verify applicant is the COR or is on the account in CIS, or is property owner with proof of property ownership
 - If applicant is **NOT** on the account, but one of the following matches the COR information:
 - Last name

- Phone number
- Email

- It is okay to proceed with the enrollment. **[Enter a note stating what piece of information matched the - COR]**
- If one of the above **DOES NOT** match it will be INC and the COR asked to reapply.

B. **Email** = If customer did not enter anything, okay to proceed
C. **Primary Phone** = If customer did not enter anything, okay to proceed
D. **Alt Phone** = If customer did not enter anything, okay to proceed
E. **Mailing Address** = Leave as is as this information comes from CIS
F. **Building Type** = Verify the customer chose Residential - Single Family
 - If blank, default to Residential - Single Family
 - Residential Mobile Home is only used for GS Rate Code
G. **Occupancy Status** = Leave what the customer has entered
 - If blank, default to Owner

Below is the completed Applicant Information, Mailing Address and Property Information

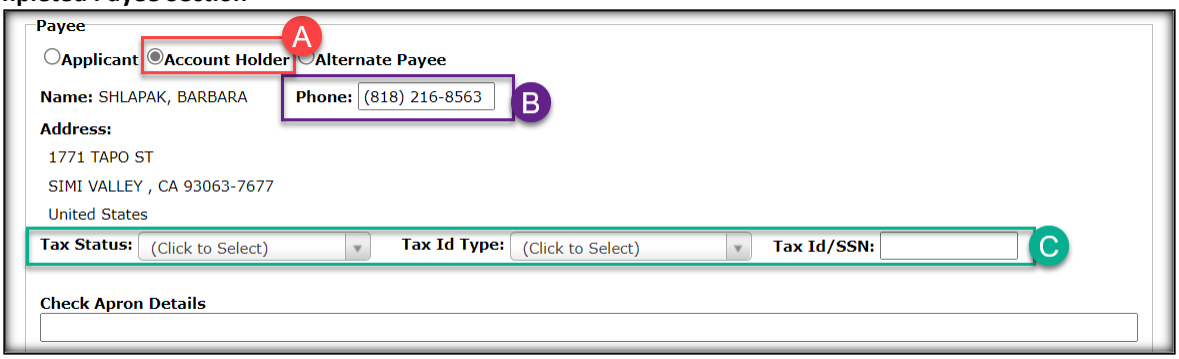


PAYEE SECTION

22. The Payee section of the Mobile Application will **ALWAYS** be the Account Holder.
 A. If the phone number is blank enter the **Primary Phone** number entered by the customer in the Applicant Information section.
 B. **If applicable (Payee for mobiles is ALWAYS Account Holder): Tax Information** = **ALWAYS** required if check is going to someone other than the account holder.
 - **Tax Status** – Leave what customer has entered
 - Default to Individual/Sole Proprietor if provided an SSN and customer leaves it blank
 - Default to Corporation if provided an EIN and customer leaves it blank
 - **Tax Id Type** – If the numbers are written
 - XXX-XX-XXXX this is an SSN, choose if customer leaves it blank
 - XX-XXXXXXX this is an EIN, choose if customer leaves it blank
 - **Tax Id/SSN** – Leave what customer has entered
 - We **MUST** have all 3 to proceed if customer does not provide EIN/SSN and it goes to an alternate payee we **MUST** INC the customer and ask them to provide it. Send appropriate INC email/letter.
 - If anything is missing and the payee is the account holder it is okay to erase what was entered if the EIN/SSN was not provided

- If the owner wants the check, they will need to provide proof of property ownership and complete Section 3 of our rebate form including Tax Information and sign and date on Section 4. The Account Holder can also sign off and we would not need proof of property ownership just Section 3 filled out with alternate payee information.

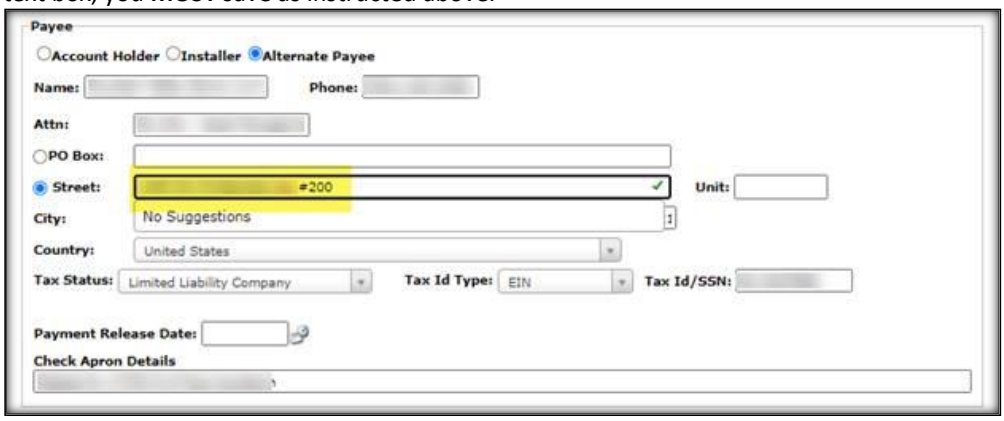
Completed Payee Section



PAYEE ADDRESS LENGTH NOTIFICATION

The system allows 35 characters in the Payee section due to the way SAP formats the payment. When you use the "Unit" text box, SAP adds 2 additional spaces as well as 'Unit:'. The issue with accepting the warning and not reducing the characters in the address is that SAP will cut the check, but digits will be left out of the payee address. As a workaround, the processor **MUST** enter the unit number within the address text box instead of the unit text box as shown below.

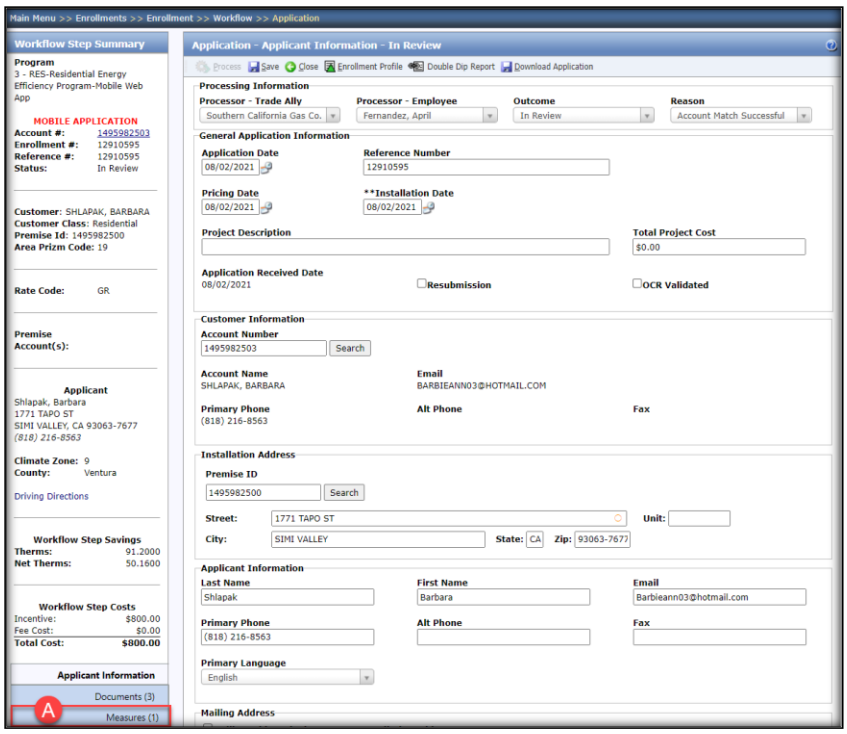
Important: After you enter the address (before you click out of the Street textbox) navigate to the top of the application and click "Save". The only way to ensure the system doesn't move the unit number back into the "Unit" text box, you **MUST** save as instructed above.



NOTE: Checks cannot go to an address outside of the United States.

MEASURE SECTION

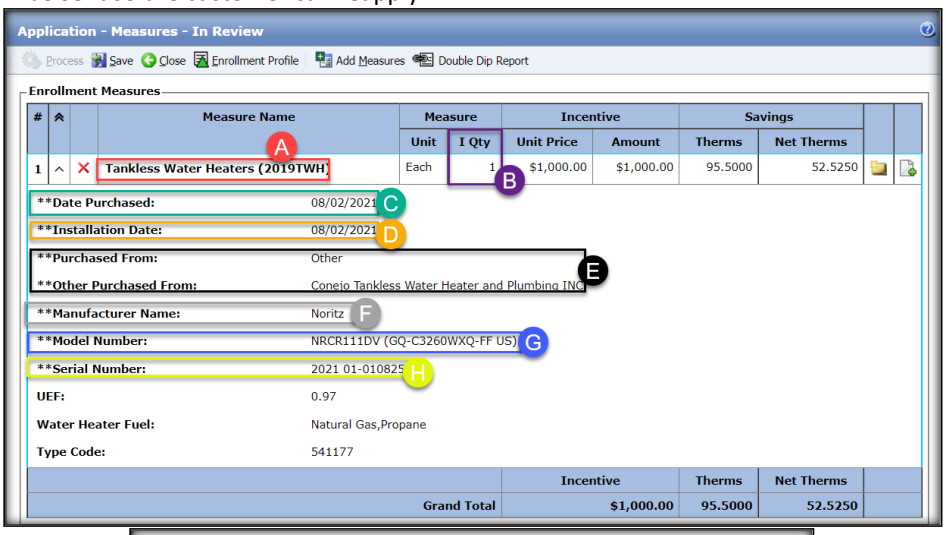
15. Open Measures section of the application in a new tab

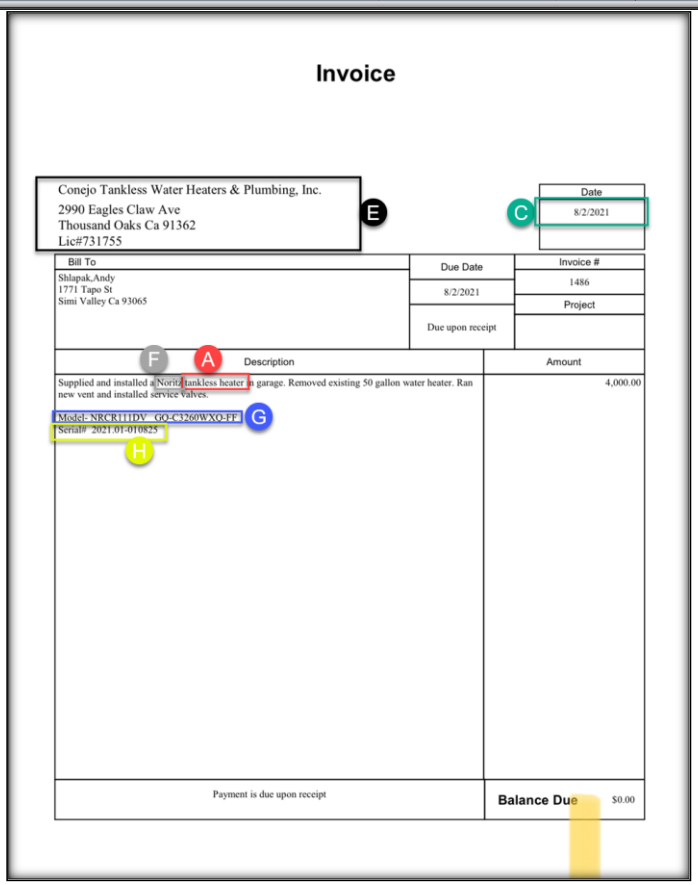


16. Once the “Measures Tab” is open
 A. **Verify** that the measure chosen by the customer matches their receipt/invoice.
 B. **Verify Measure I Qty** = 1
 - If the customer is applying for 2 of the same measure, NEVER enter QTY 2. Instead add 2 separate line items.
 - If a customer applies for 2 or more of the same measure it will require a virtual inspection. Please go to Inspections section for more information.
 - **IMPORTANT:** If customer’s invoice shows multiple units of the same measure purchased and they **DO** qualify, processor will reach out to customer to confirm the quantity they are applying for if measure is not seen in Double Dip in another enrollment. **[Nexant will place on Team Lead Review]**
 - If you see another enrollment open for the same measure and the invoice states 2 were purchased, combine the enrollments. Reference Combining 2 Enrollments for more information.
 C. **Verify Date Purchased** = Is the same date used for “Pricing Date” on Application, change if needed
 D. **Verify Installation Date** = Is the same date used for “Installation Date” on Application, change if needed
 E. **Verify Purchased From** = Is where the receipt/invoice is purchased from, change if needed
 - If not on the list, select “Other” and type it in
 F. **Verify Manufacturer Name** = Is the manufacturer provided on the receipt/invoice, change if needed
 G. **Verify Model Number** = Is the model number provided on the receipt/invoice, change if needed
 H. **Verify Serial Number** = For TWH ONLY verify there is a serial number entered.
 - For all other measures the Serial Number is not a required field in EECP.
 - If customer provides a picture of the Serial Number from the box, sticker or model plate ensure what was entered matches the image provided. Make changes if necessary.
 - The serial number does not need to be on the receipt/invoice, but if it is verify it matches what was entered in EECP. Make changes to reflect invoice if necessary.
 - In cases where the serial number on the invoice and the picture the customer provided (seen on sticker, box, equipment) **DOES NOT MATCH**, processor can update EECP with correct serial # from the picture since we know it is accurate and add note stating why they updated. **No updated invoice or geotagged photo is necessary.**

Any line item that does not have a ** is an optional field and the customer will not be penalized if they do not have those items.

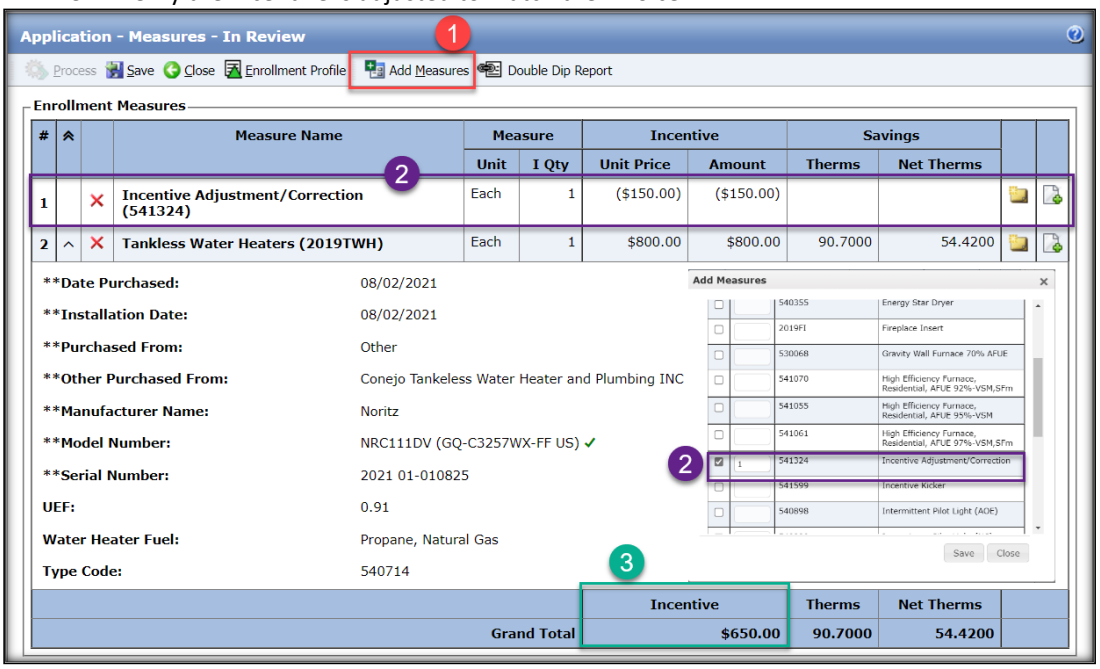
If you do not have the information for fields with ** the enrollment will be INC and cancelled and the appropriate email/letter will be sent so the customer can reapply.



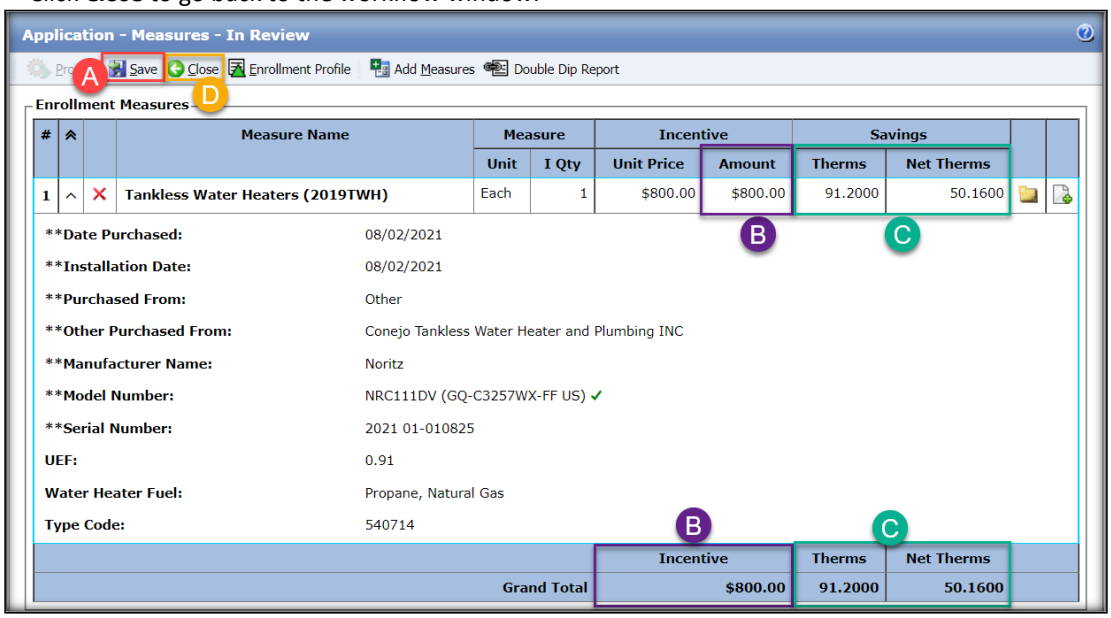


17. Once all information is entered the page will look as follows.
 A. Click **Save.**
 B. Verify the incentive amount is populating the current incentive based off the current program offerings

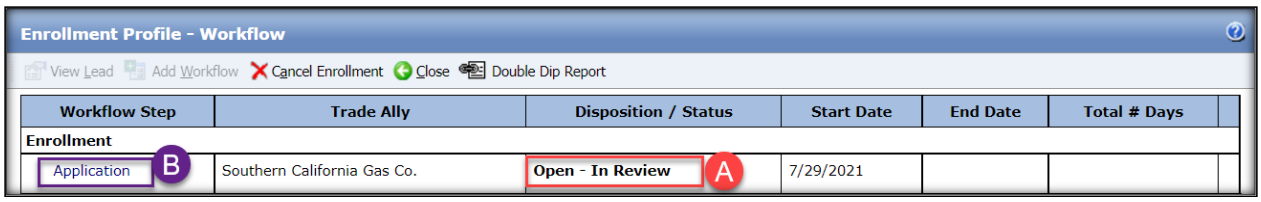
- **IMPORTANT:** If the customer paid less than the incentive, you will use the "Incentive Adjustment/Correction" measure to lower the incentive up to the purchase price of the unit, not including additional charges such as shipping or taxes.
 1. Click on "Add Measure"
 2. Add the "Incentive Adjustment/Correction" and enter the amount to adjust the incentive based off on the purchase price on the invoice pretax.
 3. Verify the Incentive is adjusted to match the invoice



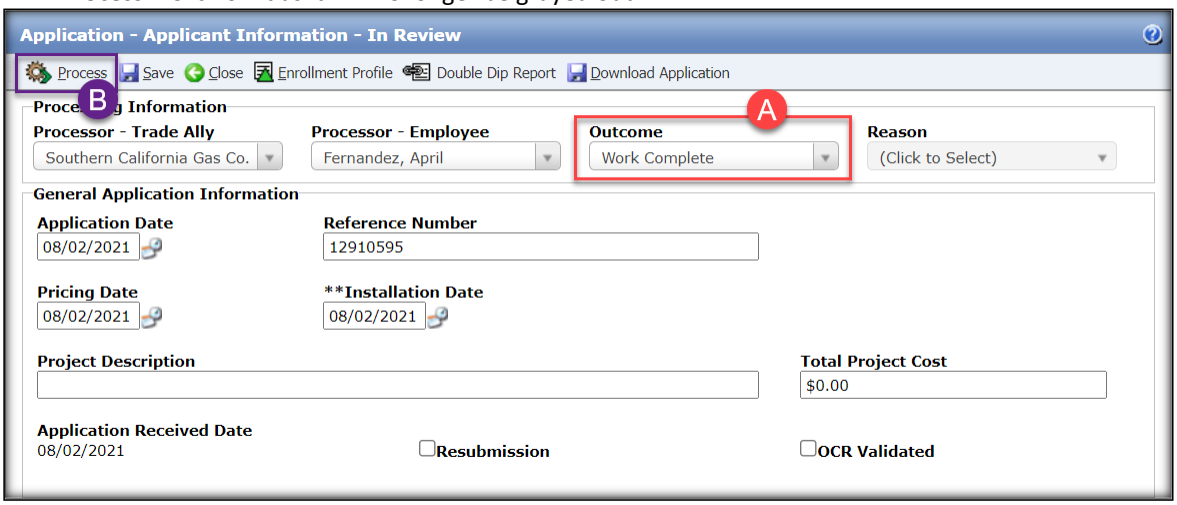
C. Click **Close** to go back to the workflow window.



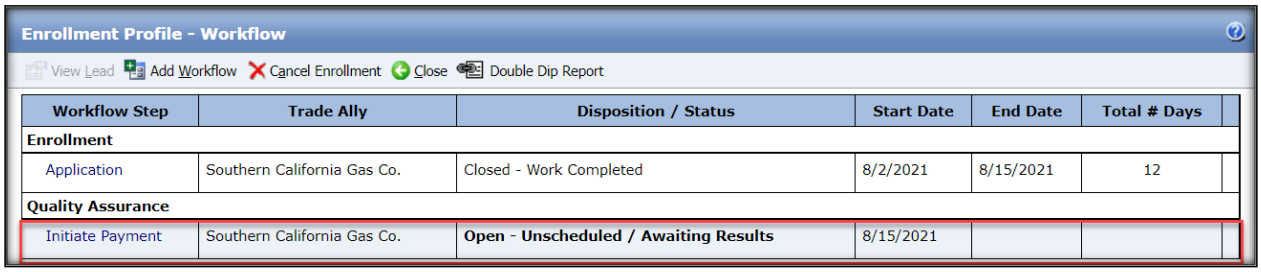
18. After clicking on "Close" you will be redirected to the Enrollment Profile – Workflow.
 A. Application Status will be Open-In Review.
 B. Click on the Application Workflow hyperlink.



19. When you are back in the Application you will change the Outcome so you can process.
 A. **Outcome** = Change to Work Complete
 B. **Process** = Click on it as it will no longer be grayed out

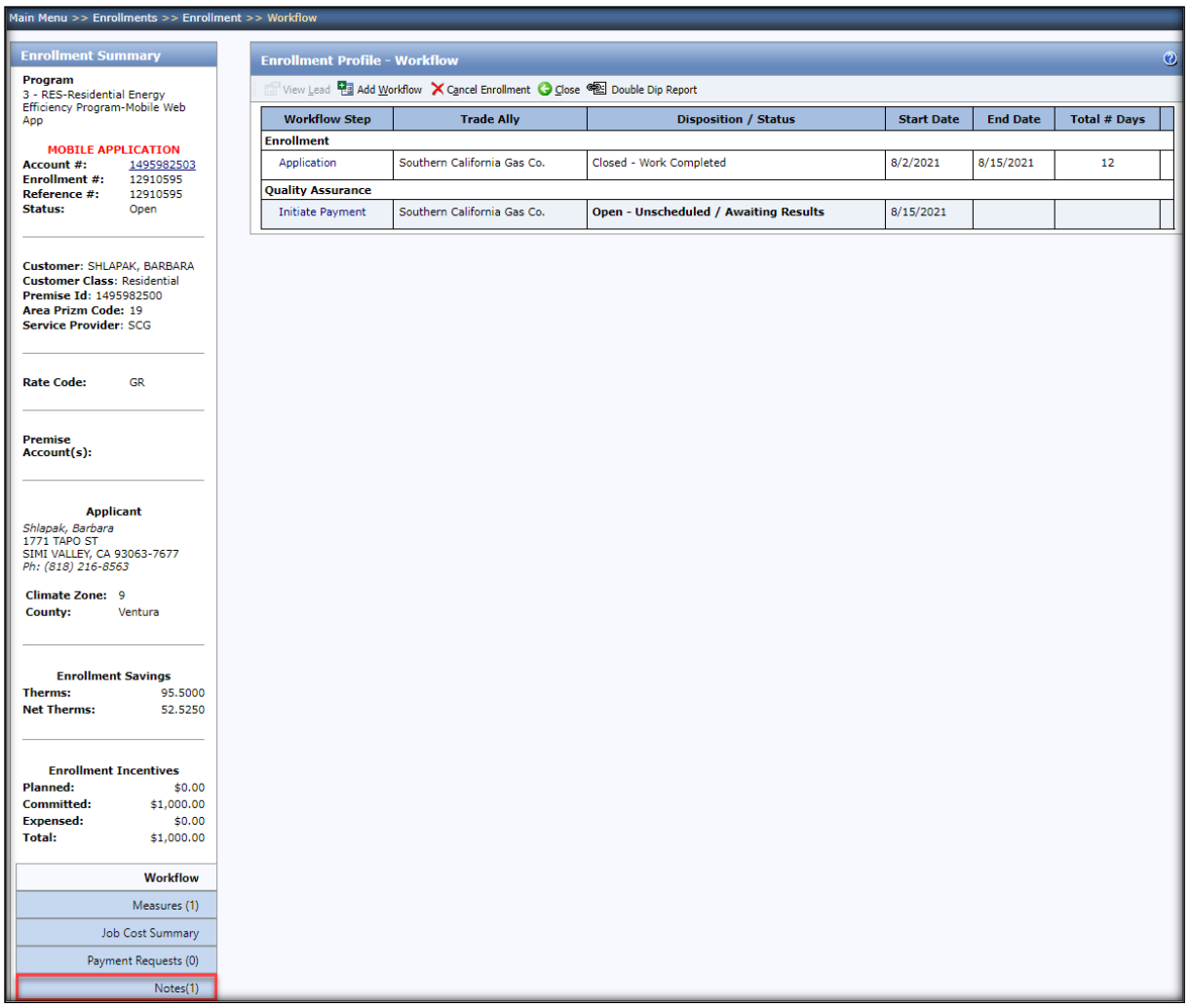


20. EECP directs the processor to the following screen. The Application Workflow "Disposition/Status" is displayed as "Closed – Work Completed" once processed. The processor will see 1 of 3 different workflows: Inspections, QA Review, or Initiate Payment displayed underneath the Application Workflow. Please ensure one of the workflows has kicked off. *****IMPORTANT: If no workflow has kicked off, please notify Processing and QA Team Lead IMMEDIATELY**

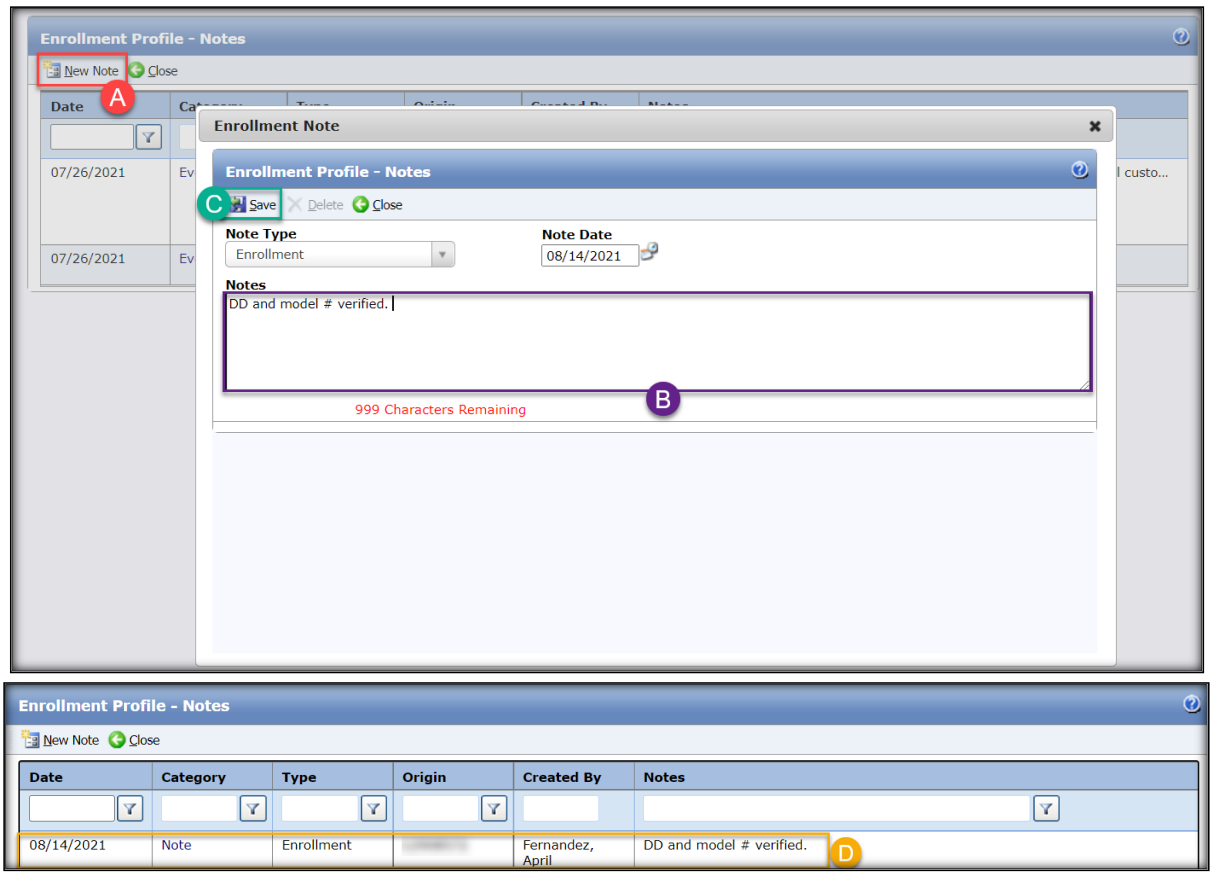


NOTES SECTION

28. The last step will be to enter a **Note** in Notes Section of the Enrollment Profile



29. You will then be directed to the Enrollment Profile – Notes:
 A. Click on **New Note** and a new window will popup
 B. Always enter a note "DD and model # verified" to verify you have checked the double dip and you have verified the model # qualifies.
 - You will also enter a note anytime you deviate from Standard Processing Procedures, go to the Notes question in in the FAQ of the Appendix.
 C. Click on **Save** to save your note.
 D. Your completed note will save to the enrollment.



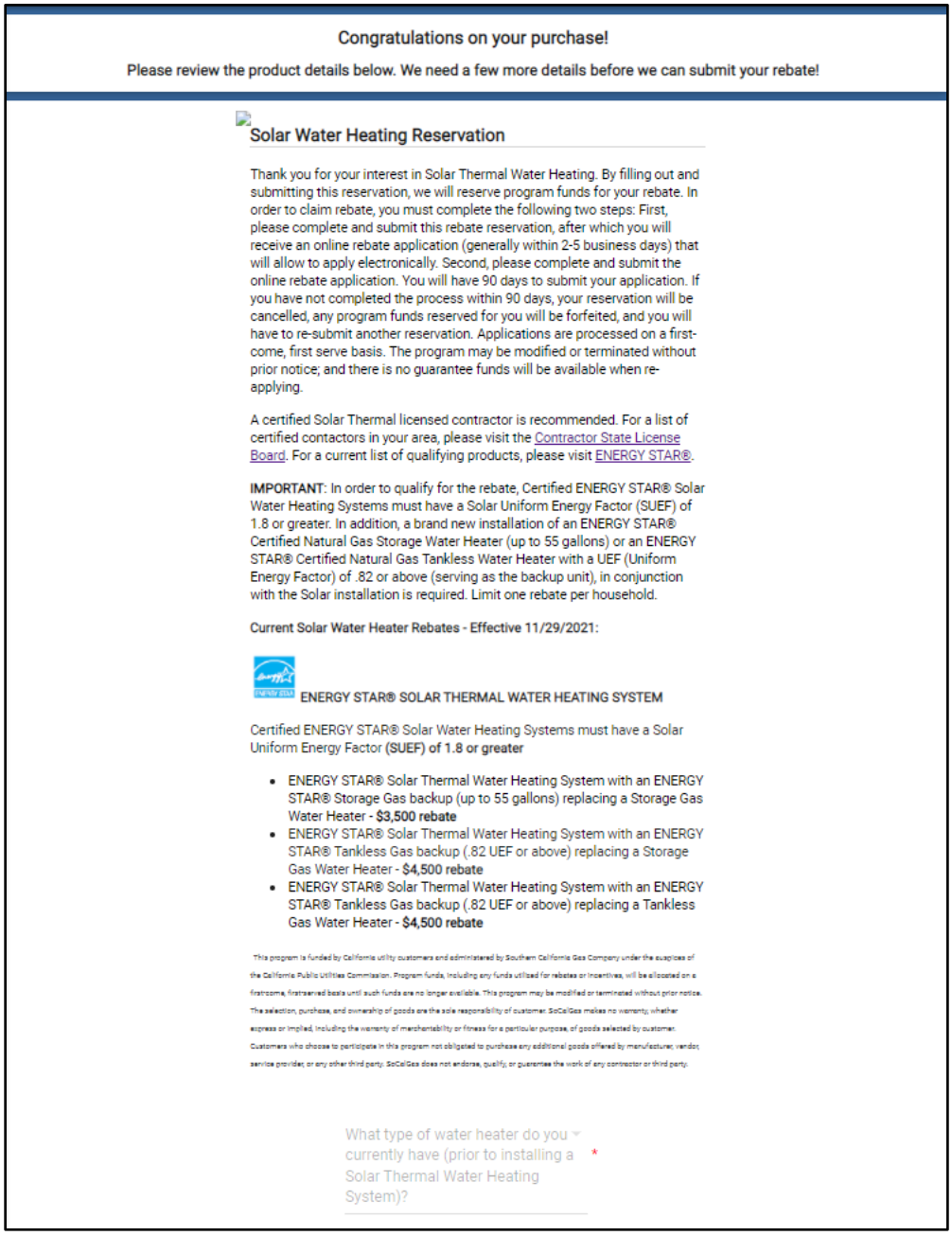
The enrollment is now complete.

If for any reason the enrollment deviates from the standard procedures or it is an INC or DNQ, ensure your note also includes that information in the notes.

If the enrollment is unable to be processed due to any missing information or the equipment the customer applied for is a DNQ, please refer to Manually Generated Emails and Letters in the Appendix on the appropriate email/letter to send.

PROCESSING SOLAR THERMAL WATER HEATING ENROLLMENTS (3702)

Customers will reserve funds for a Solar Thermal Water Heating rebate by applying through the mobile web application via program 3702 – REEP.



Congratulations on your purchase!

Please review the product details below. We need a few more details before we can submit your rebate!

Solar Water Heating Reservation

Thank you for your interest in Solar Thermal Water Heating. By filling out and submitting this reservation, we will reserve program funds for your rebate. In order to claim rebate, you must complete the following two steps: First, please complete and submit this rebate reservation, after which you will receive an online rebate application (generally within 2-5 business days) that will allow to apply electronically. Second, please complete and submit the online rebate application. You will have 90 days to submit your application. If you have not completed the process within 90 days, your reservation will be cancelled, any program funds reserved for you will be forfeited, and you will have to re-submit another reservation. Applications are processed on a first-come, first serve basis. The program may be modified or terminated without prior notice; and there is no guarantee funds will be available when re-applying.

A certified Solar Thermal licensed contractor is recommended. For a list of certified contactors in your area, please visit the Contractor State License Board. For a current list of qualifying products, please visit ENERGY STAR®.

IMPORTANT: In order to qualify for the rebate, Certified ENERGY STAR® Solar Water Heating Systems must have a Solar Uniform Energy Factor (SUEF) of 1.8 or greater. In addition, a brand new installation of an ENERGY STAR® Certified Natural Gas Storage Water Heater (up to 55 gallons) or an ENERGY STAR® Certified Natural Gas Tankless Water Heater with a UEF (Uniform Energy Factor) of .82 or above (serving as the backup unit), in conjunction with the Solar installation is required. Limit one rebate per household.

Current Solar Water Heater Rebates - Effective 11/29/2021:

ENERGY STAR® SOLAR THERMAL WATER HEATING SYSTEM

Certified ENERGY STAR® Solar Water Heating Systems must have a Solar Uniform Energy Factor **(SUEF) of 1.8 or greater**

- ENERGY STAR® Solar Thermal Water Heating System with an ENERGY STAR® Storage Gas backup (up to 55 gallons) replacing a Storage Gas Water Heater - **$3,500 rebate**
- ENERGY STAR® Solar Thermal Water Heating System with an ENERGY STAR® Tankless Gas backup (.82 UEF or above) replacing a Storage Gas Water Heater - **$4,500 rebate**
- ENERGY STAR® Solar Thermal Water Heating System with an ENERGY STAR® Tankless Gas backup (.82 UEF or above) replacing a Tankless Gas Water Heater - **$4,500 rebate**

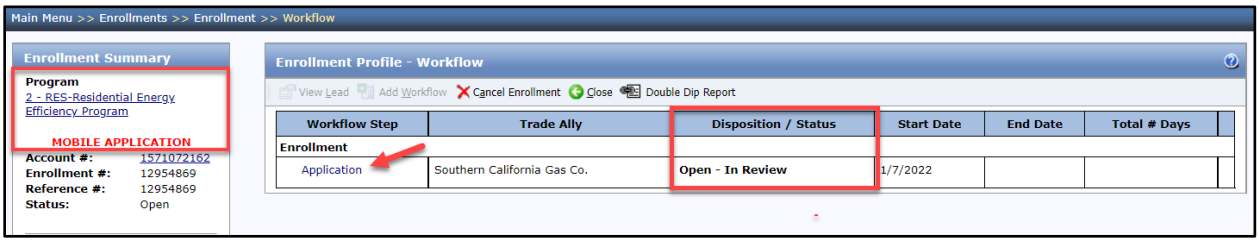
This program is funded by California utility customers and administered by Southern California Gas Company under the auspices of the California Public Utilities Commission. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. The selection, purchase, and ownership of goods are the sole responsibility of customer. SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods selected by customer. Customers who choose to participate in this program not obligated to purchase any additional goods offered by manufacturer, vendor, service provider, or any other third party. SoCalGas does not endorse, qualify, or guarantee the work of any contractor or third party.

What type of water heater do you currently have (prior to installing a Solar Thermal Water Heating System)? *

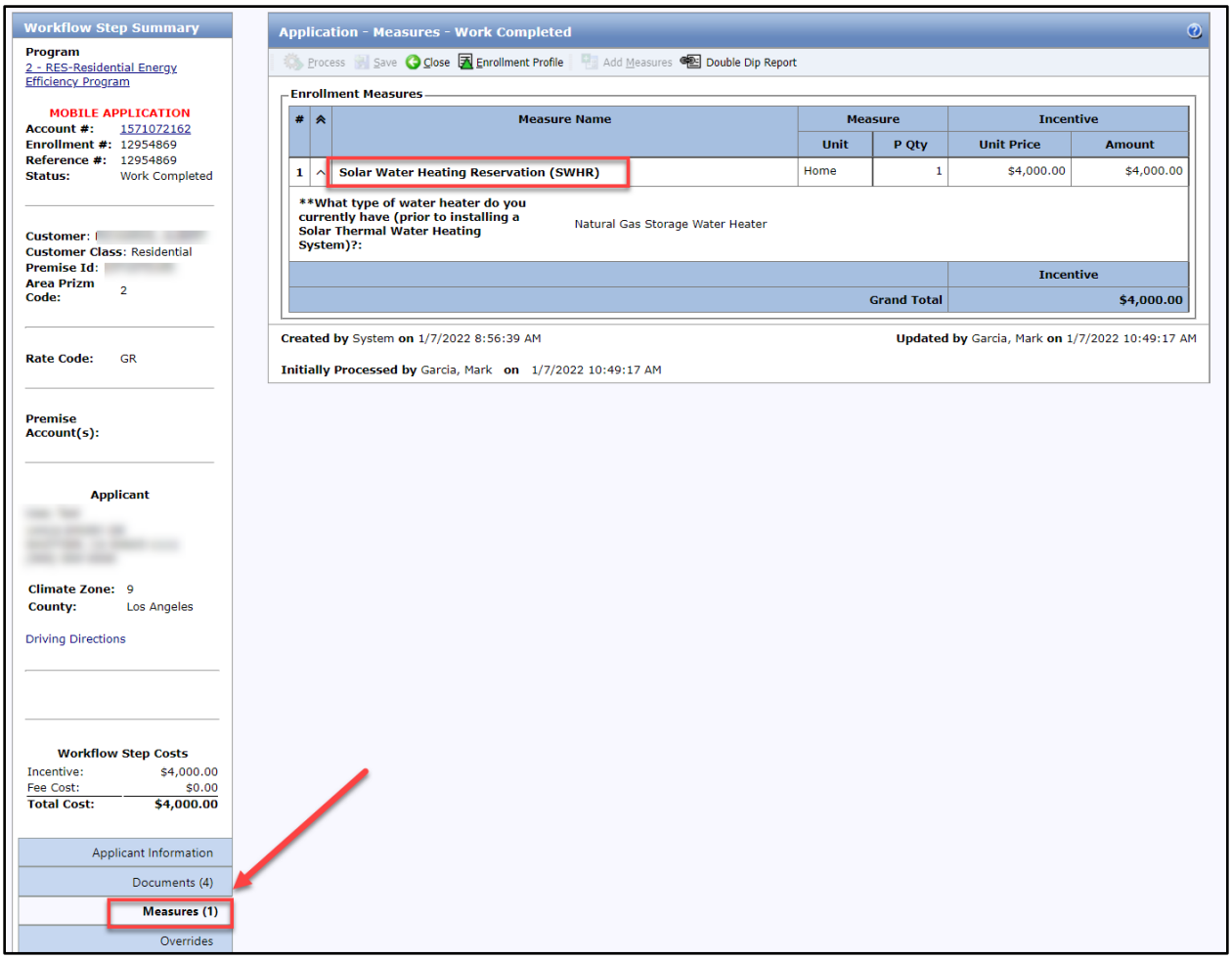
Once the customer submits the reservation, an enrollment will be created for a reserved incentive of $4,000.00.

APPLICATION – ENROLLMENT PROCESSOR

The enrollment will be created with a status of “Open - In Review”. Click on “Application” to access the Application WF.



To verify that this a Solar Thermal Water Heating Reservation, click on the Measures tab.
*All solar thermal water heating applications should have measure code “SWHR” with a “P Qty” within the Application WF.

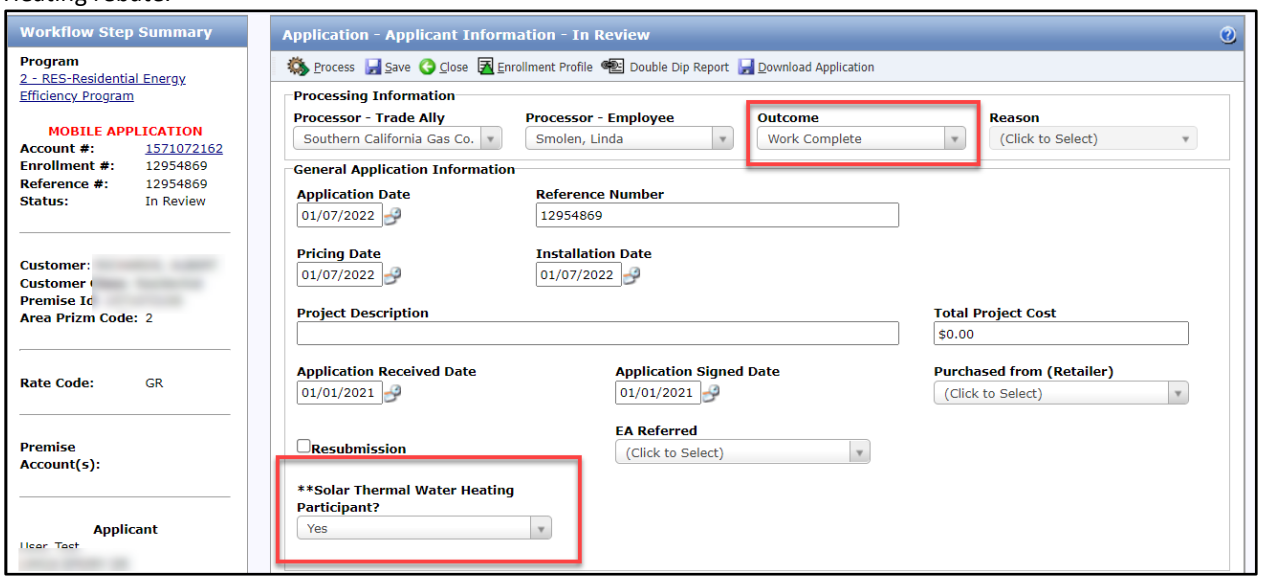


Once it has been verified that the enrollment is participating in the solar thermal water heating reservation, navigate back to the “Applicant Information” within the Application WF.

There has been one additional required application field added to REEP.
“Solar Thermal Water Heating Participant?”

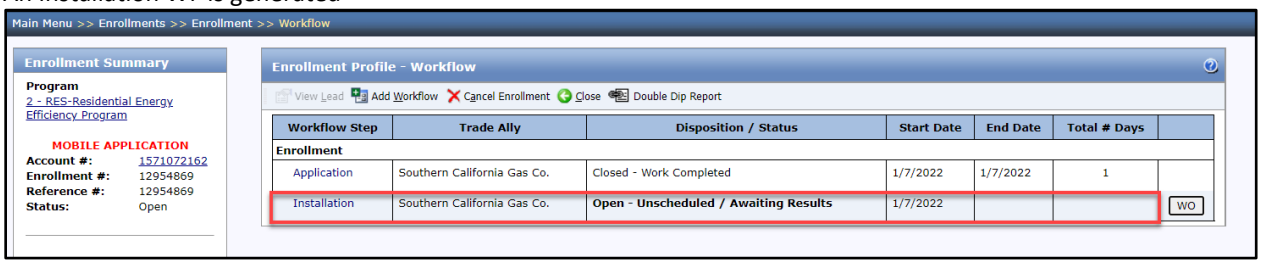
Select “Yes” from drop down to ensure that an Installation WF is generated after processing.

**Please note: “No” should be selected for all applications that are not particpating in the Solar Thermal Water Heating rebate.

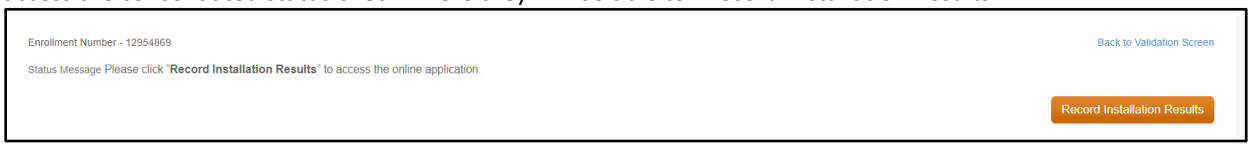


Click Process once all required fields have been entered.

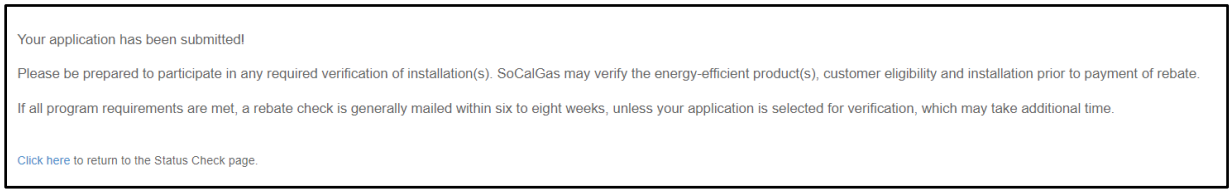
An Installation WF is generated



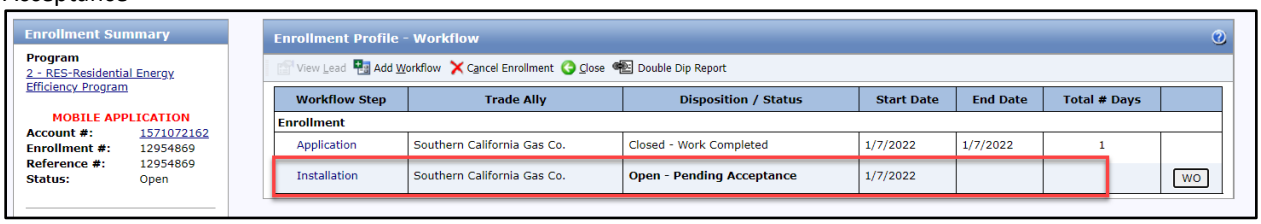
Once the Installation WF is generated, an email is automatically sent to the customer to notify them that they will need to apply for the solar thermal water heating rebate. The customer will use the link embedded in the email to access the consolidated status check where they will be able to “Record Installation Results”



**It is important to leave the status of the Installation WF on “Open – Unscheduled / Awaiting Results” to ensure that the customer can edit. At this step, the customer will add the rebated measure and required documents.

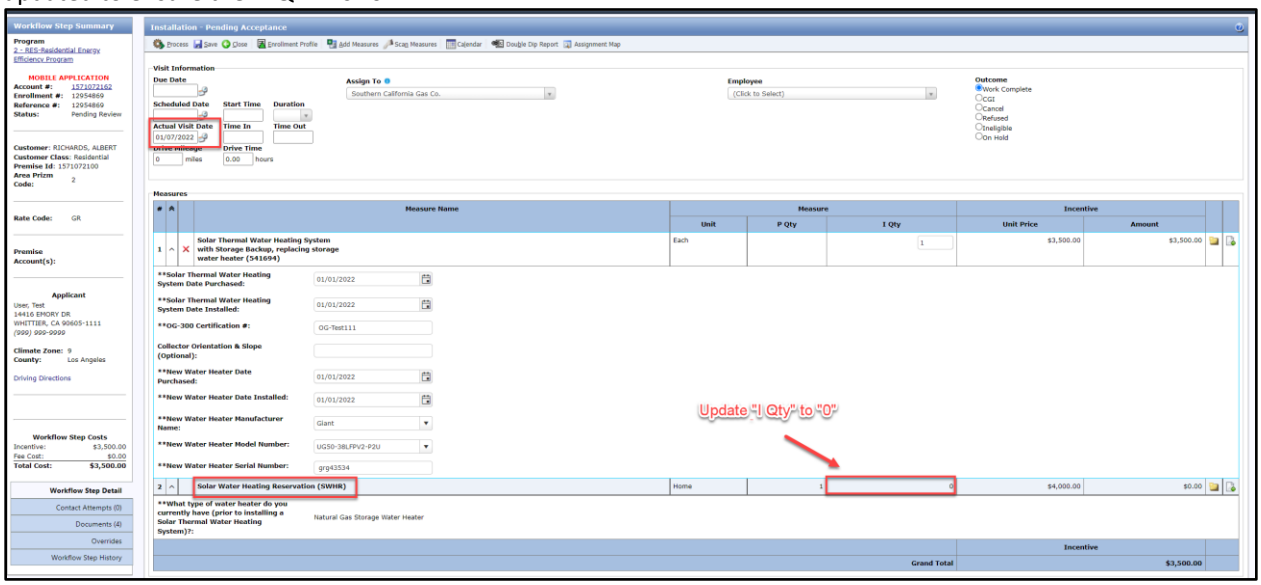


The customer submits the results which will update the status of the Installation WF. “Open – Pending Acceptance”



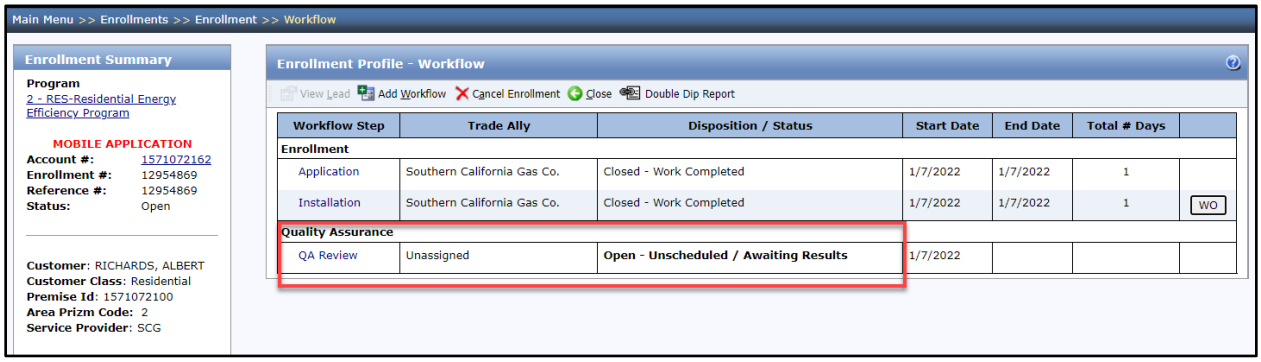
Click “Installation” to access the Installation WF.

There will be two measures installed within the Installation WF. The reservation measure (SWHR) will need to be updated to ensure the “I QTY” is “0”.



Three new documents have been added by the customer and can be viewed by clicking on the “Documents” tab.

Once all data has been verified, click process.
The enrollment will now follow the regular process and be sent to either Inspection or QA Review.



WHEN DO YOU NEED INSPECTIONS?

Inspections can occur in 2 ways. First, inspections are added at random for 5% of all REEP processed applications. If an enrollment is randomly chosen for inspection the Inspection Specialist will be notified and will assign a Virtual Inspection to take place with one of our Field Agents.

Second, inspections can be manually added to enrollment. When a manual inspection is to be added the processor will notate the enrollment as to why an inspection is needed and will send a ticket to the following:

- Inspection Specialist(s)
- CC - Payment Specialist
- CC - QA Specialist(s)
- CC - QA Team Lead
- CC - Processing Team Lead

Refer to Our REEP Team for the most current members.

This will ensure the inspection is added before it is processed before any other workflows are completed. The blank ticket can be found in the Appendix under Support Tickets.

Example of completed ticket:

Subject: Request for Manual Inspection Request

Manual Inspection Request	
Requestor:	April Fernandez
Enrollment #:	12345678
Program Name:	REEP – Mobile Application
Customers Name:	John Doe
Customers Address:	555 West 5th Street
Measures for Inspection:	2 Tankless Water Heaters
Reason for Inspection:	Applied for 2 or more of the same measure
Expedite Yes or No:	No
Enrollment# of Previous Installation:	N/A
Model/Serial of Previously Paid Measure:	N/A

Manual inspections will be requested for the following reasons:

- Customer is applying for 2 or more of the same measure
- Customer is applying for a 2nd unit but has already received an incentive for the same measure.

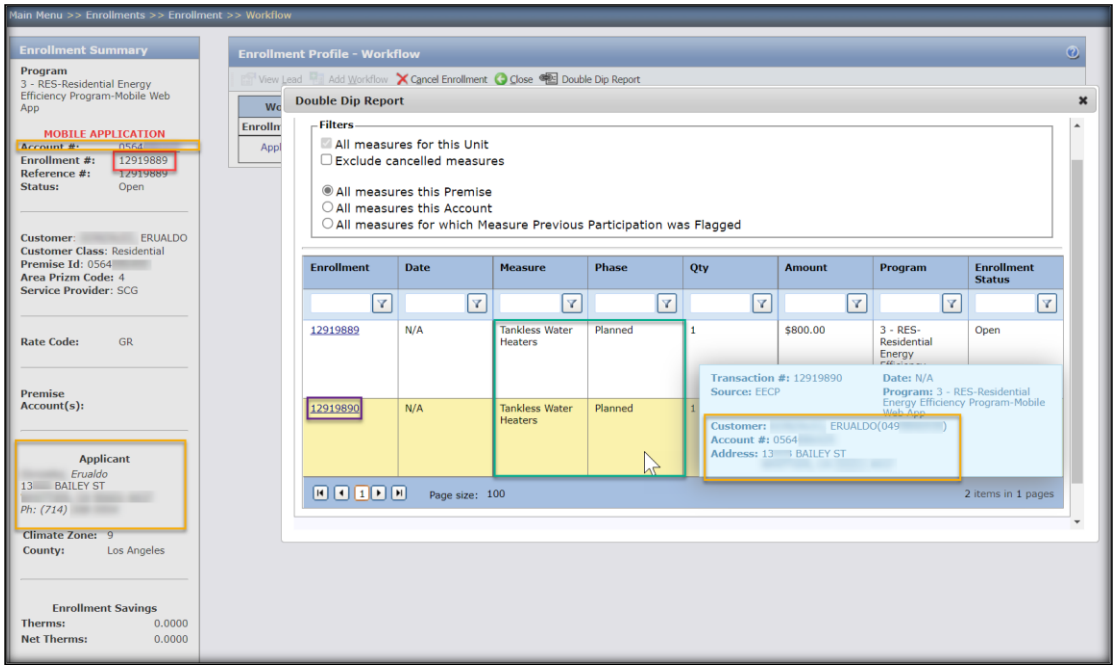
IMPORTANT: If an enrollment was chosen for inspection at random but was cancelled due to unresponsiveness and they reapplied. Their resubmission WILL be sent to inspection. Processors WILL notate the resubmission as well as their request with the original enrollment number as to why an inspection is being requested.

COMBINING 2 ENROLLMENTS

To make it easier for the Inspection Team, if a customer has different enrollments and is applying for more than 1 of the same measure, the processor will combine the measures into 1 enrollment. This usually happens on the mobile application platform as customers are only allowed to apply for one item at a time.

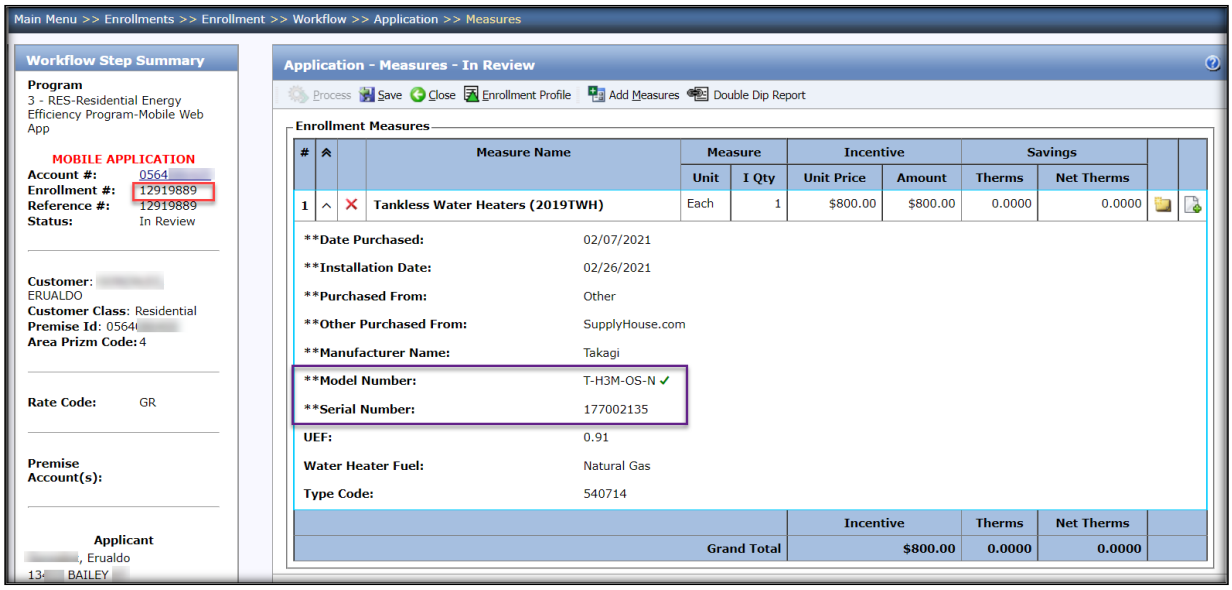
If you have determined that a customer has applied for 2 of the same measures, but in two different applications you will combine them into one enrollment. Choose the enrollment with the earliest application date and cancel the enrollments with the older date. Notate all enrollments on which application will be processed and which will be cancelled and the reasons why.

See example below of a customer who is applying for 2 tankless water heaters on 2 different enrollments, but the installation address, account number, and customer are the same.

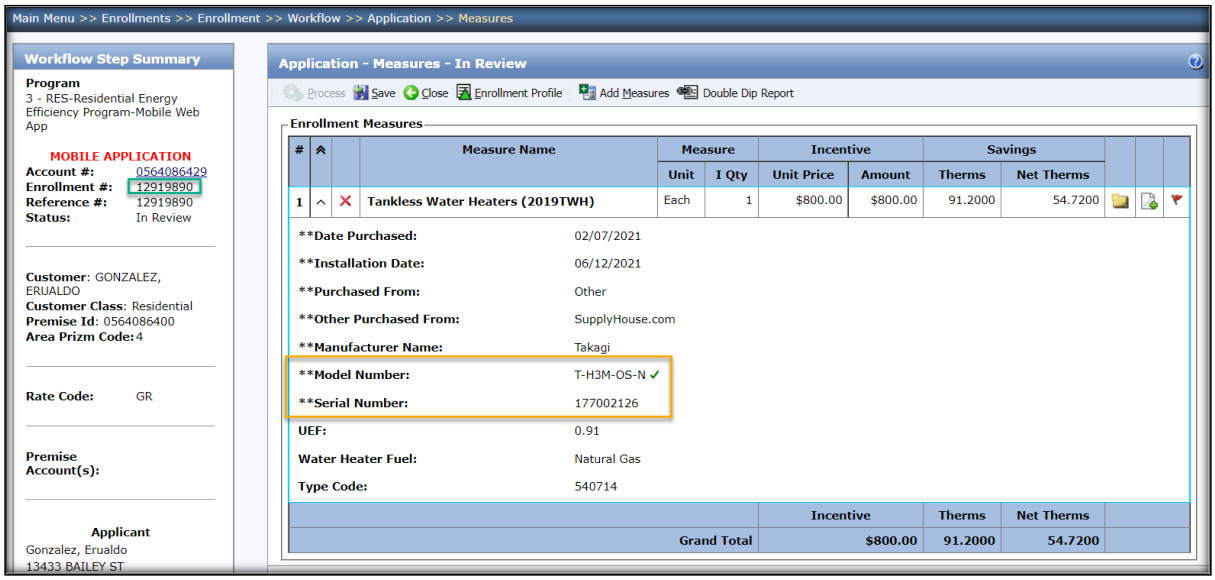


We will work in enrollment 12919889 and cancel 12919890. Open both enrollments and proceed to the measures page of both.

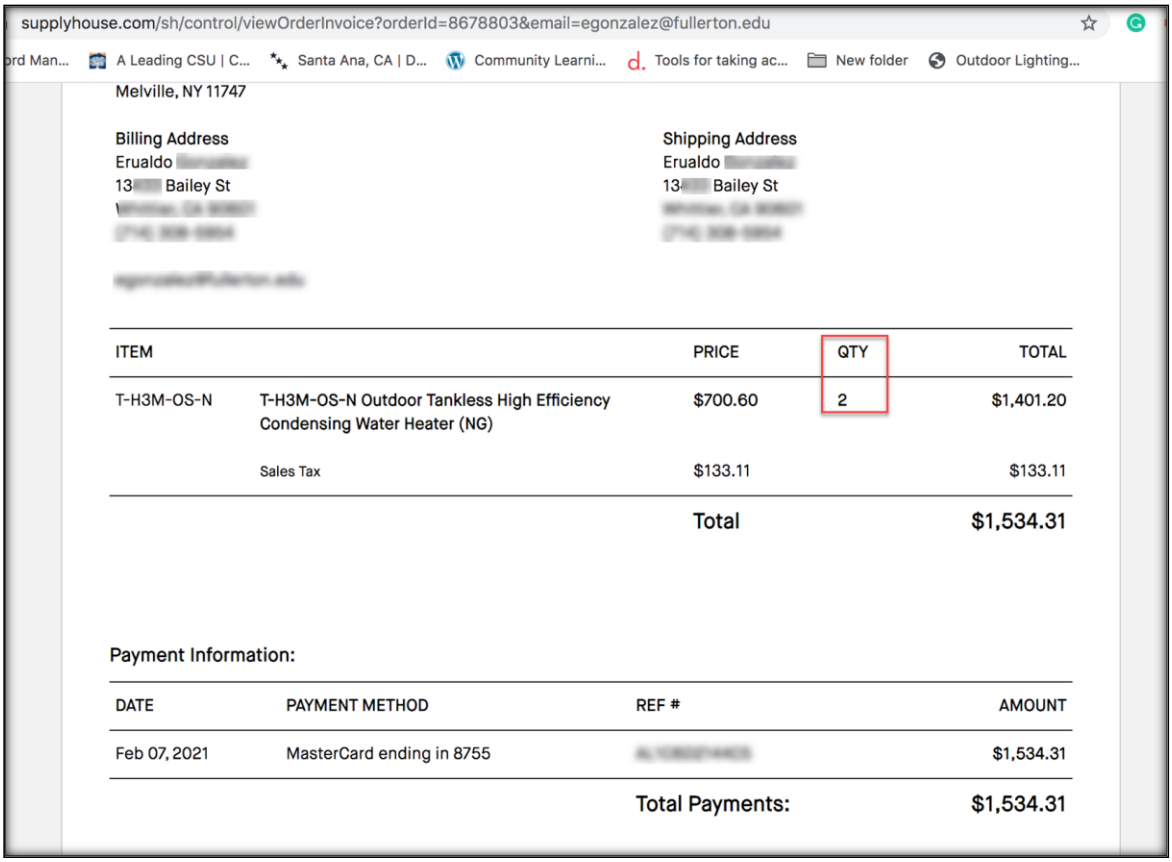
Enrollment 12919889



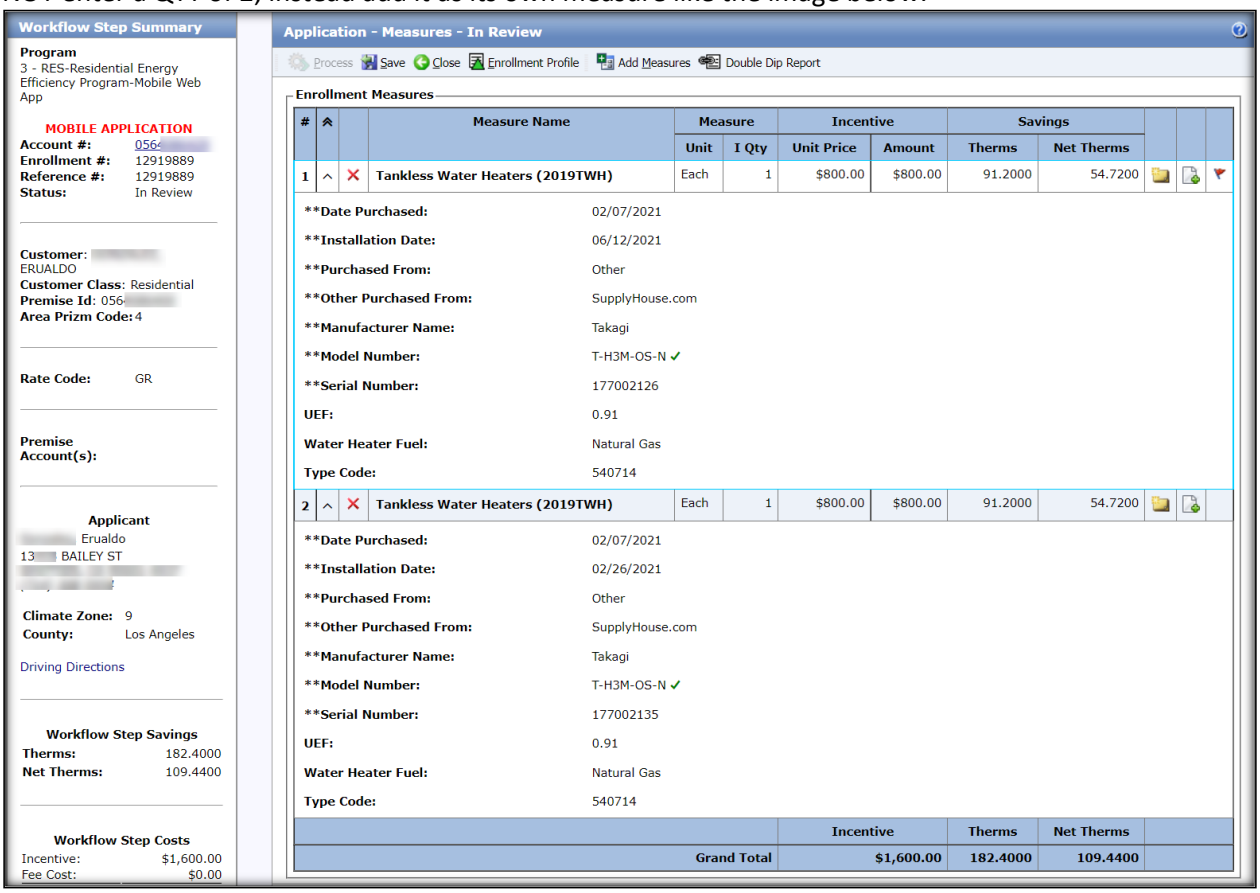
Enrollment 12919890



Notice that the serial numbers for both tankless water heaters are different, this is verification that the customer is applying for 2 different tankless water heaters. Another way to verify is on the invoice. The customer will either have 2 different invoices showing the different purchases or it will all be on one invoice. In this case, we have the 2 tankless water heaters on one invoice.



Once you have determined that the customer has in fact purchased 2 of the same measures you will combine them. In our example, we will add the tankless water heater from 12919890 to 12919889. DO NOT enter a QTY of 2, instead add it as its own measure like the image below.



Workflow Step Summary

Program
3 - RES-Residential Energy Efficiency Program-Mobile Web App

MOBILE APPLICATION
Account #: 0564
Enrollment #: 12919889
Reference #: 12919889
Status: In Review

Customer: ERUALDO
Customer Class: Residential
Premise Id: 056
Area Prizm Code: 4

Rate Code: GR

Premise Account(s):

Applicant
Erualdo
13 BAILEY ST

Climate Zone: 9
County: Los Angeles

Driving Directions

Workflow Step Savings
Therms: 182.4000
Net Therms: 109.4400

Workflow Step Costs
Incentive: $1,600.00
Fee Cost: $0.00

Application - Measures - In Review

Process | Save | Close | Enrollment Profile | Add Measures | Double Dip Report

Enrollment Measures

#	Measure Name	Measure Unit	Measure I Qty	Incentive Unit Price	Incentive Amount	Savings Therms	Savings Net Therms
1	Tankless Water Heaters (2019TWH)	Each	1	$800.00	$800.00	91.2000	54.7200

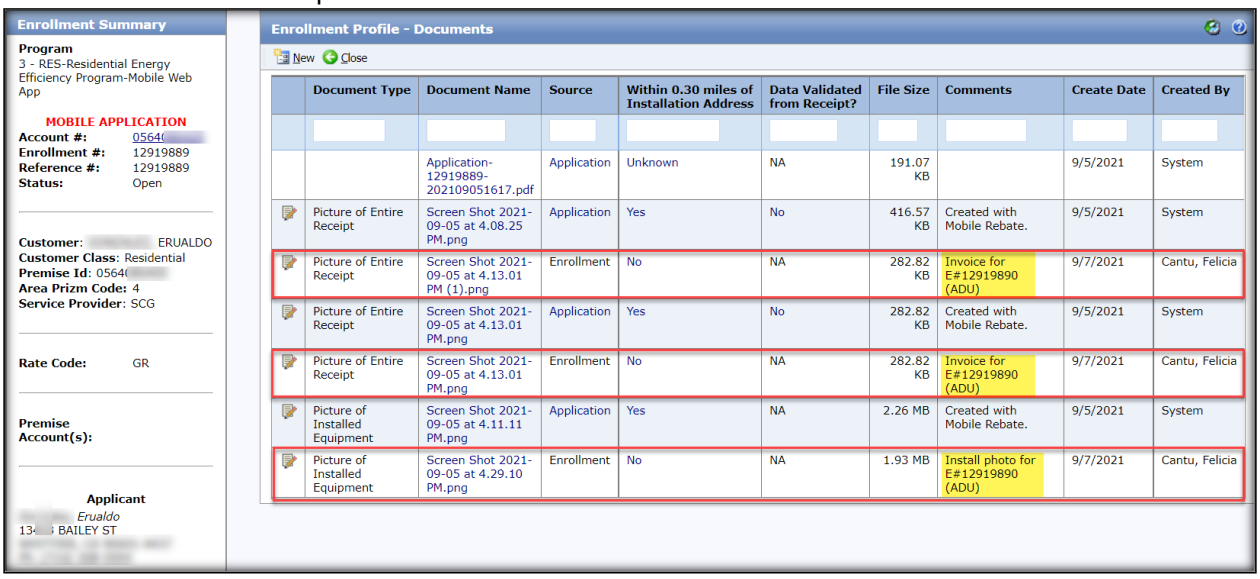
**Date Purchased:	02/07/2021
**Installation Date:	06/12/2021
**Purchased From:	Other
**Other Purchased From:	SupplyHouse.com
**Manufacturer Name:	Takagi
**Model Number:	T-H3M-OS-N ✓
**Serial Number:	177002126
UEF:	0.91
Water Heater Fuel:	Natural Gas
Type Code:	540714

#	Measure Name	Measure Unit	Measure I Qty	Incentive Unit Price	Incentive Amount	Savings Therms	Savings Net Therms
2	Tankless Water Heaters (2019TWH)	Each	1	$800.00	$800.00	91.2000	54.7200

**Date Purchased:	02/07/2021
**Installation Date:	02/26/2021
**Purchased From:	Other
**Other Purchased From:	SupplyHouse.com
**Manufacturer Name:	Takagi
**Model Number:	T-H3M-OS-N ✓
**Serial Number:	177002135
UEF:	0.91
Water Heater Fuel:	Natural Gas
Type Code:	540714

	Incentive	Therms	Net Therms
Grand Total	$1,600.00	182.4000	109.4400

Next, you will add the documents from 12919890 to 12919889 and notate where each document came from. Please see the example below.



Enrollment Summary

Program
3 - RES-Residential Energy Efficiency Program-Mobile Web App

MOBILE APPLICATION
Account #: 0564
Enrollment #: 12919889
Reference #: 12919889
Status: Open

Customer: ERUALDO
Customer Class: Residential
Premise Id: 0564
Area Prizm Code: 4
Service Provider: SCG

Rate Code: GR

Premise Account(s):

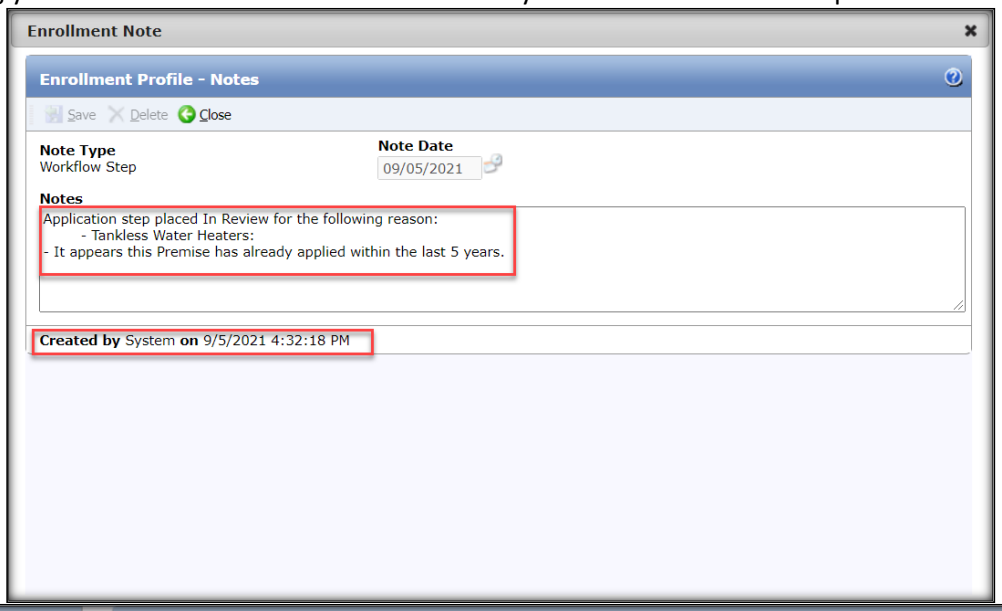
Applicant
Erualdo
13 BAILEY ST

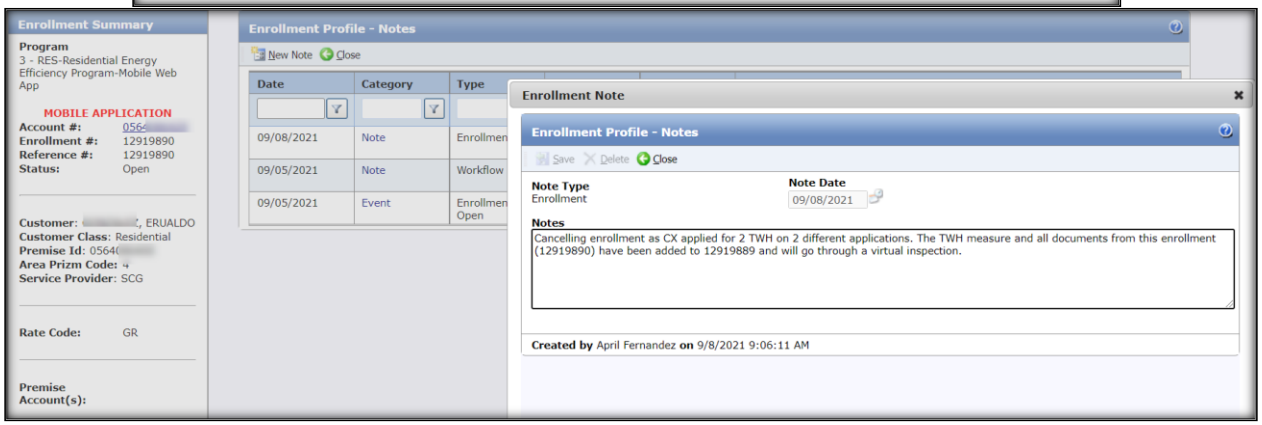
Enrollment Profile - Documents

New | Close

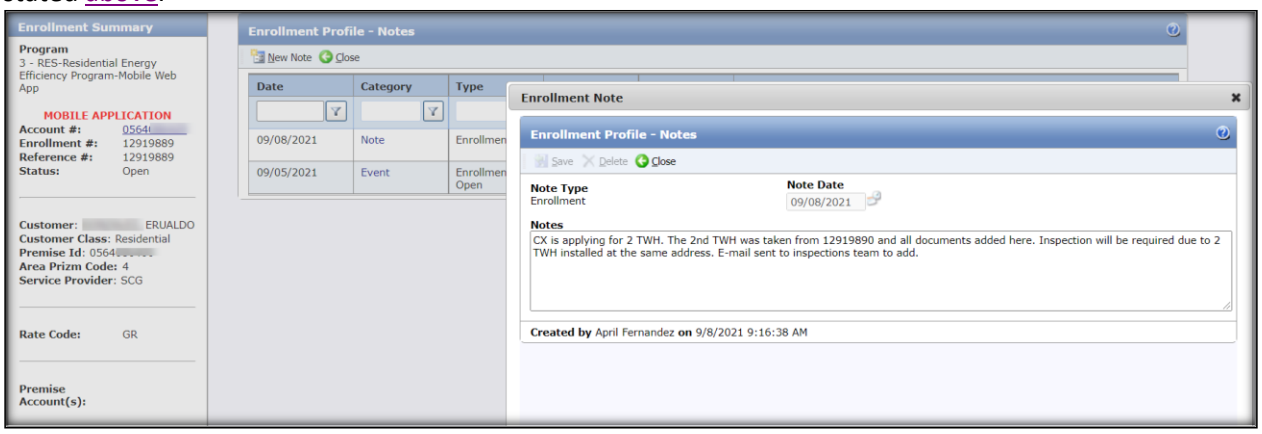
Document Type	Document Name	Source	Within 0.30 miles of Installation Address	Data Validated from Receipt?	File Size	Comments	Create Date	Created By
	Application-12919889-20210905161 7.pdf	Application	Unknown	NA	191.07 KB		9/5/2021	System
Picture of Entire Receipt	Screen Shot 2021-09-05 at 4.08.25 PM.png	Application	Yes	No	416.57 KB	Created with Mobile Rebate.	9/5/2021	System
Picture of Entire Receipt	Screen Shot 2021-09-05 at 4.13.01 PM (1).png	Enrollment	No	NA	282.82 KB	Invoice for E#12919890 (ADU)	9/7/2021	Cantu, Felicia
Picture of Entire Receipt	Screen Shot 2021-09-05 at 4.13.01 PM.png	Application	Yes	No	282.82 KB	Created with Mobile Rebate.	9/5/2021	System
Picture of Entire Receipt	Screen Shot 2021-09-05 at 4.13.01 PM.png	Enrollment	No	NA	282.82 KB	Invoice for E#12919890 (ADU)	9/7/2021	Cantu, Felicia
Picture of Installed Equipment	Screen Shot 2021-09-05 at 4.11.11 PM.png	Application	Yes	NA	2.26 MB	Created with Mobile Rebate.	9/5/2021	System
Picture of Installed Equipment	Screen Shot 2021-09-05 at 4.29.10 PM.png	Enrollment	No	NA	1.93 MB	Install photo for E#12919890 (ADU)	9/7/2021	Cantu, Felicia

Then you will cancel out the enrollment 12919890 where you moved everything from and notate everything you did. You will also see a note from the system about the double dip:





Once you have cancelled the enrollment, proceed to processing the enrollment (12919889) where you have combined the 2 measures. You will notate in this enrollment everything that you did and add that an inspection will be required. Then, you will send the "Manual Inspection Request" ticket to the people stated above.



Product Specifications and Rebates by Measure

EECP VERIFICATIONS

Although EECP has been configured to assist us in verifying the eligibility of a specified measure, processors MUST ensure the correct incentive is applied in accordance with the current pricing schedule. Incentives are always changing and updating so it is important to be aware of any recent changes that occur throughout the year. The Team Lead will make you aware of these changes.

The incentive amount and requirement vary per unit based on purchase date. Please refer to Pricing Cheat Sheet Year 2020 and 2021 in the Appendix.

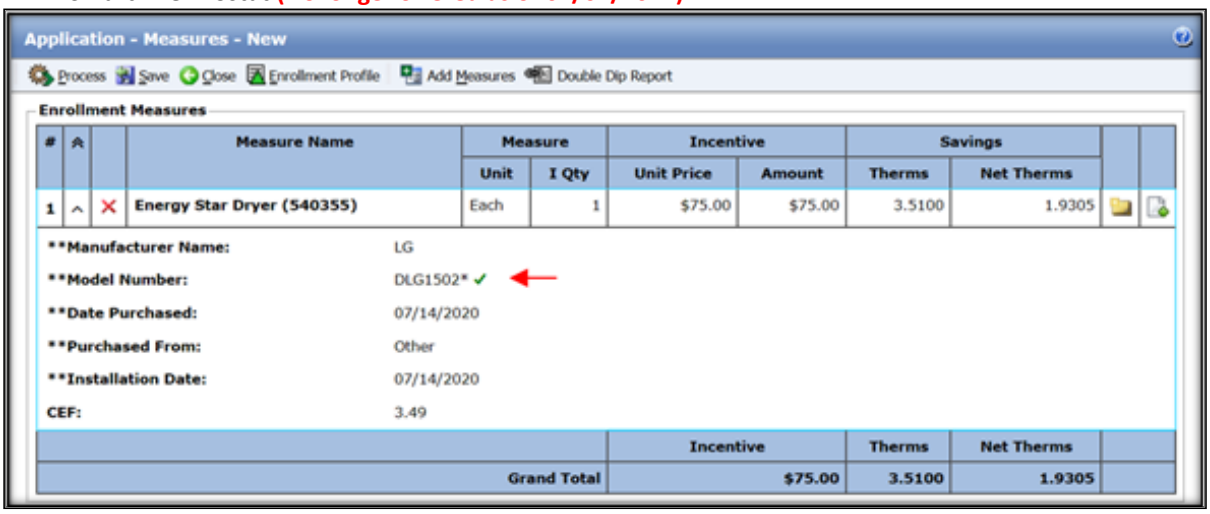
GREEN CHECKMARK/DROPDOWN LIST

Processors will verify first if the model number entered in EECP matches the model number on the receipt.

- If the model number as shown on the receipt/invoice matches a model number listed in EECP's dropdown menu, no additional documentation is needed to verify the model's eligibility.
- If the model number shown on the receipt/invoice **DOES NOT** match the model number listed in EECP, processor will change it to match the receipt/invoice and add documentation if model number is not in dropdown menu.

The following measures will have a green check mark indicating they qualify for a rebate, and no additional documentation is needed:

- Clothes Dryers
- Storage Water Heaters
- Tankless Water Heaters
- Natural Gas Furnaces **(Does not have a green check mark and will need specs if not in drop down)**
- **Gravity Wall Furnaces (No longer offered as of 07/01/2021)**
- **Smart Thermostat (No longer offered as of 01/01/2021)**



The measures, as listed below, are verified through the dropdown, and will not have a green check mark. If the model is found on the drop-down list, it is good to be processed. All models that qualify will be on the Qualifying Product List (QPL), if it is not the processor is to verify it does not qualify by checking the specifications on the approved websites.

- Fireplace Insert
- Pool Heater
- Oven

All measures, that have not been verified either as being listed in the EECP dropdown or displaying a green check mark, will need to be reviewed according to the requirements specified by the Energy Efficiency Rebate Program, and verified on the Energy Star, AHRI, CEC, CEE, Energy Efficiency Ratings (Fireplace Inserts ONLY), or the manufacturer's website.

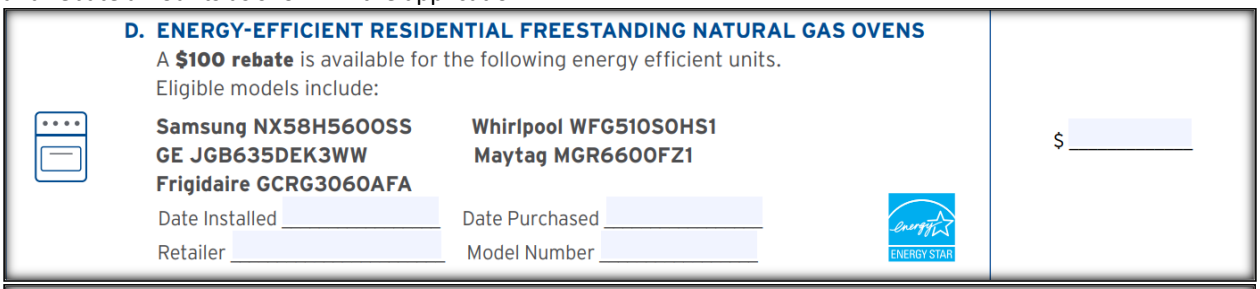
- Energy Star: https://www.energystar.gov/productfinder/
- CEC: https://cacertappliances.energy.ca.gov/Pages/ApplianceSearch.aspx
- AHRI: https://www.ahridirectory.org/Search/SearchHome?ReturnUrl=%2f
- CEE: http://www.cee1.org/
- DOE: https://www.regulations.doe.gov/certification-data/#q=Product_Group_s%3A*
- Energy Efficiency Ratings (Fireplace Inserts ONLY): https://oee.nrcan.gc.ca/pml-lmp/index.cfm?action=app.search-recherche&appliance=FIREPLACE_G
- Manufacturing company: Acceptable if you cannot find specs from any of the sites above, BUT it needs PA approval so they can ask engineering. **Inform Processing and QA Team Leads when this occurs.**

A document showing the measure's specifications will be added to the documents section of the enrollment. A note will be added indicating the specifications were attached in EECP.

If the customer does a manual entry on a measure, you can readd the measure to get the green check mark if you know it is on the list. If not, please proceed with looking up the measure on the websites above and providing the correct documentation as well as note.

OVEN

The natural gas oven rebates were effective 10/01/2020. Any oven purchases made prior to 10/01/2020 will be a DNQ. A customer can apply for multiple ovens, they will just need to go through an inspection. Oven specifications and rebate amounts as shown in the application:



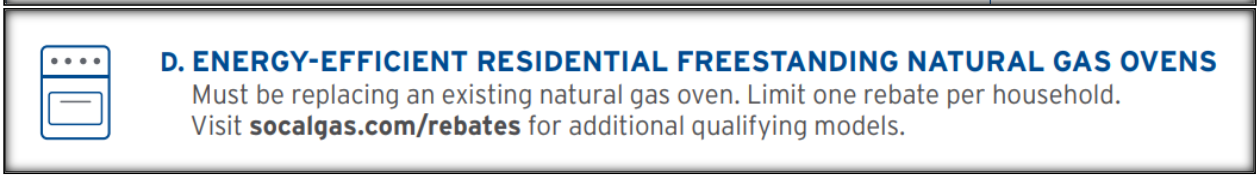
D. ENERGY-EFFICIENT RESIDENTIAL FREESTANDING NATURAL GAS OVENS

A **$100 rebate** is available for the following energy efficient units.
Eligible models include:

Samsung NX58H5600SS **Whirlpool WFG510S0HS1**
GE JGB635DEK3WW **Maytag MGR6600FZ1**
Frigidaire GCRG3060AFA

Date Installed _____ Date Purchased _____
Retailer _____ Model Number _____

$ _____



D. ENERGY-EFFICIENT RESIDENTIAL FREESTANDING NATURAL GAS OVENS

Must be replacing an existing natural gas oven. Limit one rebate per household.
Visit **socalgas.com/rebates** for additional qualifying models.

Below is the **QPL** – Use this as reference when determining the eligibly of the product model. Only the ovens below qualify for the rebate. The last 2 digits are for the color, if most of the model numbers match except for the last 2 ask for an exception from Processing Team Lead to pass.

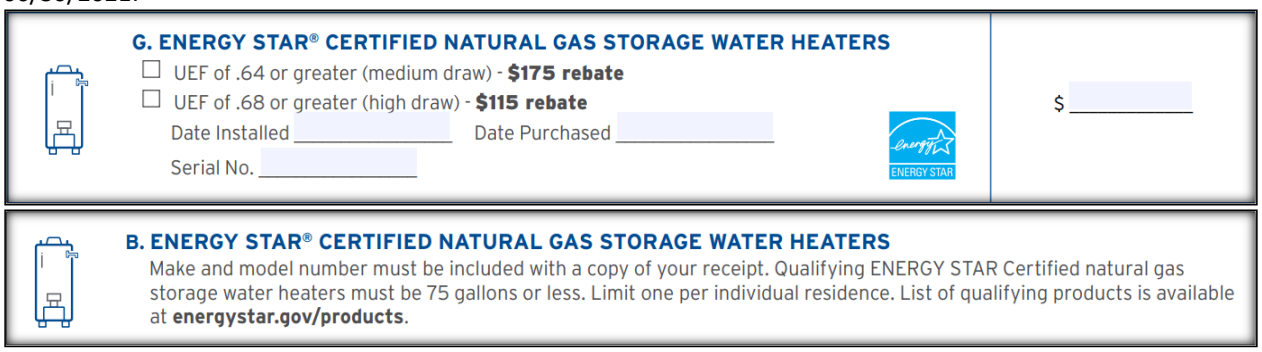
SoCalGas

Qualifying Oven Models for SoCalGas Rebate Updated 11.5.21

Manufacturer Name	Model
Amana	AGR6603SFB
Amana	AGR6603SFS
Amana	AGR6603SFW
Frigidaire	GCRG3060AFA
GE	JGB635DEK3WW
GE	JGB635REKSS
Kenmore	227511361
LG	LRG3194ST
Maytag	MGR6600FB
Maytag	MGR6600FW
Maytag	MGR6600FZ
Samsung	NX58R5601SS
Samsung	NX58H56OOSS
Samsung	NX58T5601S
Whirlpool	WFG510S0HS1
Whirlpool	WFG515S0JB
Whirlpool	WFG515S0JS
Whirlpool	WFG515S0JW
Whirlpool	WFG525S0JB
Whirlpool	WFG525S0JS
Whirlpool	WFG525S0JT
Whirlpool	WFG525S0JV
Whirlpool	WFG525S0JW
Whirlpool	WFG525S0JZ
Whirlpool	WFG535S0JS
Whirlpool	WFG535S0JV
Whirlpool	WFG535S0JZ
Whirlpool	WFG550S0HB
Whirlpool	WFG550S0HV
Whirlpool	WFG550S0HW
Whirlpool	WFG550S0HZ
Whirlpool	WEG515S0FB
Whirlpool	WEG515S0FS
Whirlpool	WEG515S0FV
Whirlpool	WEG515S0FW

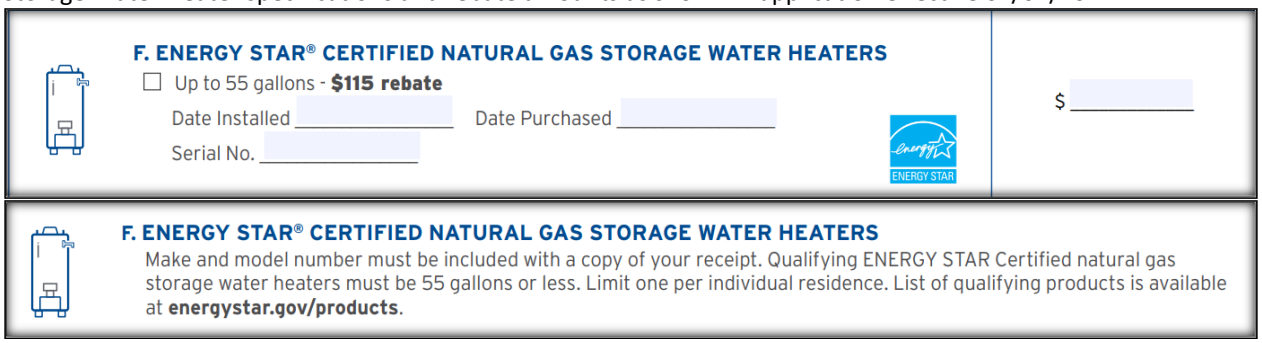
STORAGE WATER HEATER

Storage Water Heater specifications and rebate amounts as shown in application effective 01/01/2021 to 06/30/2021:



Note: Purchases made prior to 07/01/2021 for SWH that qualified through UEF, but not the draw can still be paid until we no longer accept 2021 purchases (02/15/2022). For example, if the SWH is a .64 UEF AND is high draw, then the customer qualifies for the $175 rebate amount and a note will be added indicating that it was a high draw, i.e., "SWH - (enter UEF of SWH) UEF high draw" MUST be noted. Example of note: "SWH - .65 UEF high draw"

Storage Water Heater specifications and rebate amounts as shown in application effective 07/01/2021:



A customer can apply for multiple storage water heaters, they will just need to go through an inspection.

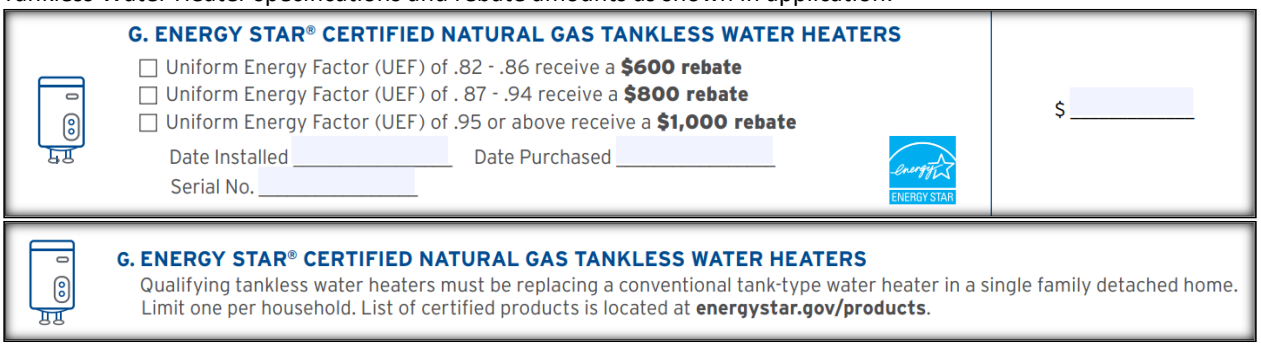
IMPORTANT New SWH direction:

- If unit was previously classified as ENERGY STAR certified but the model is discontinued, we can still rebate those units.
- If a unit is not on the ENERGY STAR list, we should NOT rebate those units.
- If a unit meets the specs, is not on ENERGY STAR list (previous and currently), you can send to PM for approval on case-by-case basis (if customer complains about DNQ).

Note: Though the mail in application is asking for a serial number for the SWH, it is not a required field in EECP. Therefore, if a customer does not enter it, you can still proceed with processing the application.

TANKLESS WATER HEATER

Tankless Water Heater specifications and rebate amounts as shown in application:



The serial number is required as of 03/18/2021. For prior applications, processor will enter N/A. Anything received after 03/18/2021 will be an incomplete and a INC email/letter sent to the customer asking to reapply.

For mail in applications, the serial number for TWH **MUST** be provided on at least one of the following:

- Products Rebate Section
- Invoice
- Picture of model number plate, box, or sticker

If no serial number is provided, then an INC email/letter will be sent to the customer asking to reapply.

For online and mobile applications, a serial number MUST be entered by the customer. Verify that what the customer entered matches the invoice and/or picture if it is provided on them, change what is in EECP if needed.

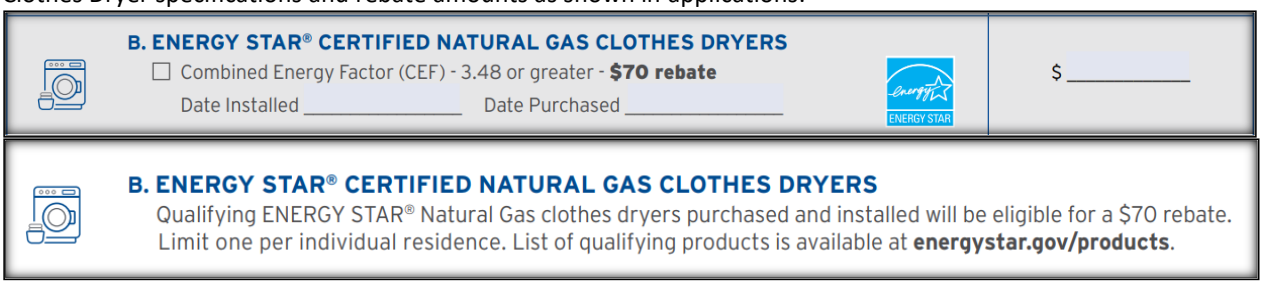
IMPORTANT: Monitor purchases made from "Monkey Wrench"; they have been sent a letter on 08/28/2021 letting them know we will no longer be accepting their altered invoices. If you see this happening, please notify Processing and QA Team Leads **IMMEDIATELY**.

Note: Qualifying tankless water heaters MUST be replacing a conventional tank type water heater in a single family detached home to qualify.

A customer can apply for multiple tankless water heaters, they will just need to go through an inspection.

CLOTHES DRYER

Clothes Dryer specifications and rebate amounts as shown in applications:

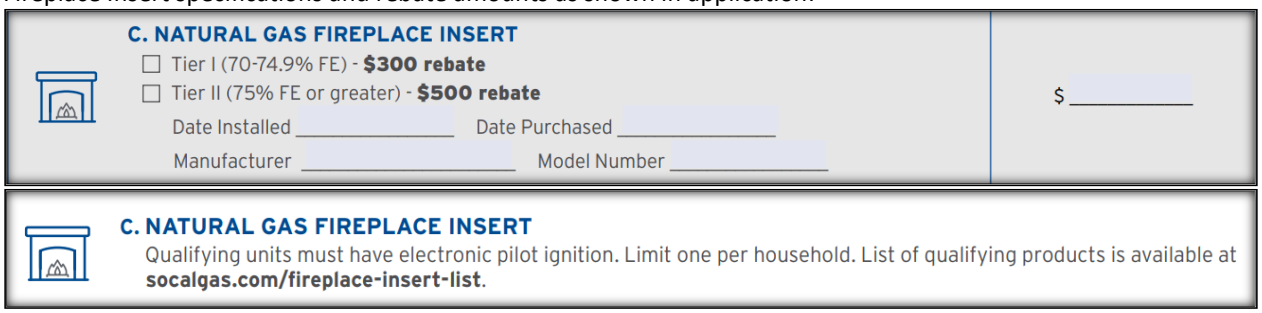


A customer can apply for dryers, they will just need to go through an inspection.

***Per PM, Stackable units (CD/CW) towers are now eligible only if the CEF meets our requirement of 3.48 and has a 4.4 Cubic Feet or greater. ***

FIREPLACE INSERT

Fireplace Insert specifications and rebate amounts as shown in application:



A customer can apply for multiple fireplace inserts, they will just need to go through an inspection.

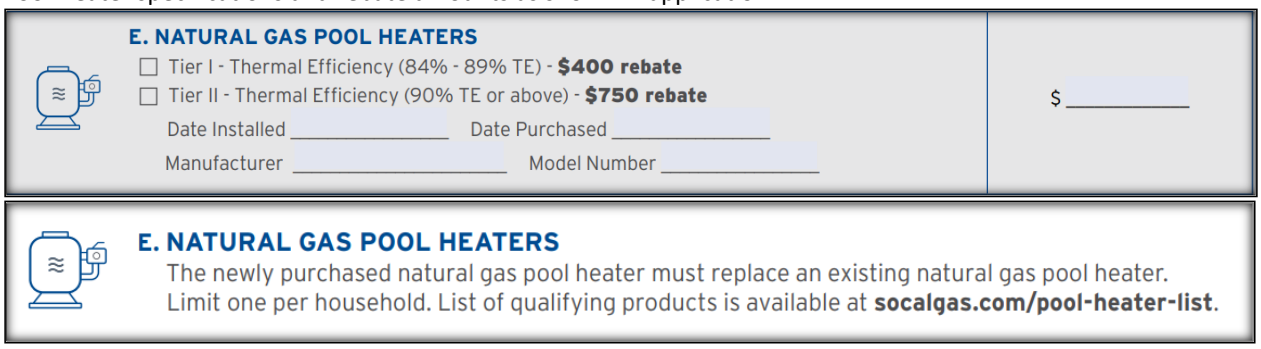
Processors will verify the model number entered in EECP matches the model number on the receipt. EECP is configured to **ONLY** allow customers to apply for fireplace inserts on our fireplace insert list. Effective 02/14/2022 the fireplace insert list has been updated. *Other models **NOT** found on the fireplace insert list may qualify for rebate;* Search: Fireplaces, gas | Energy Efficiency Ratings | Natural Resources Canada (nrcan.gc.ca)

If a Fireplace Insert qualifies and is not on the list, please add the appropriate specifications in the Documents section and add an appropriate note.

- In EECP, the processor will choose a random Fireplace Insert model that has the same incentive amount as the Fireplace Insert that is not on the list.
- Add a note in EECP stating "Chose a random Fireplace Insert with the same incentive as the one the CX applied for is not on the list. Added spec sheet showing it qualified."

POOL HEATER

Pool Heater specifications and rebate amounts as shown in application:



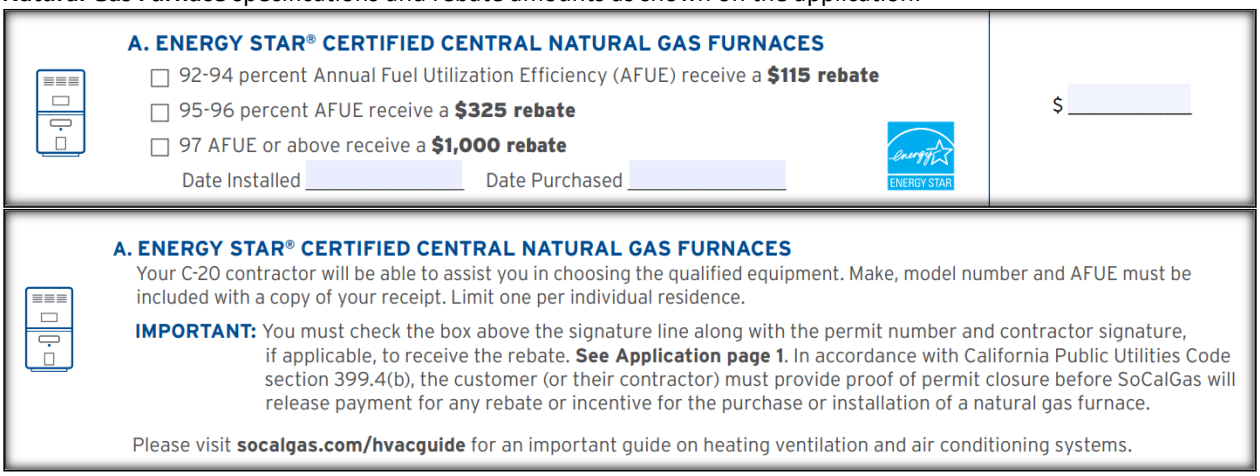
For pool heater purchase's made from Leslie's, use the "Pool Heater List with Leslie's Skus" Excel sheet to determine the model #, if not on the list send an INC email/letter missing model # to the customer.

If a pool heater qualifies but is not on the QPL you will need to add a spec sheet as well as enter the Thermal Efficiency in EECP in the "Other TE" field

Effective 02/02/2022 new pool heaters have been added to the QPL, please make sure to visit that list.
A customer can apply for multiple pool heaters, they will just need to go through an inspection.

NATURAL GAS FURNACE

Natural Gas Furnace specifications and rebate amounts as shown on the application:



A. ENERGY STAR® CERTIFIED CENTRAL NATURAL GAS FURNACES

☐ 92-94 percent Annual Fuel Utilization Efficiency (AFUE) receive a **$115 rebate**

☐ 95-96 percent AFUE receive a **$325 rebate**

☐ 97 AFUE or above receive a **$1,000 rebate**

Date Installed _____ Date Purchased _____

$ _____

A. ENERGY STAR® CERTIFIED CENTRAL NATURAL GAS FURNACES

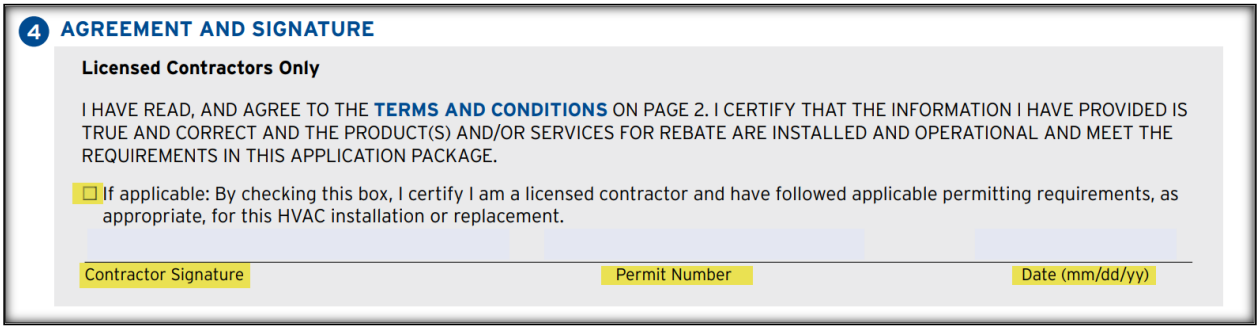
Your C-20 contractor will be able to assist you in choosing the qualified equipment. Make, model number and AFUE must be included with a copy of your receipt. Limit one per individual residence.

IMPORTANT: You must check the box above the signature line along with the permit number and contractor signature, if applicable, to receive the rebate. **See Application page 1.** In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide proof of permit closure before SoCalGas will release payment for any rebate or incentive for the purchase or installation of a natural gas furnace.

Please visit **socalgas.com/hvacguide** for an important guide on heating ventilation and air conditioning systems.

A customer CANNOT apply for multiple furnaces. If a customer's invoice indicates multiple furnaces have been purchased and there is no indication of one being installed in an ADU, process the application for ONLY 1 furnace. If customer comes back stating the other furnace is installed in an ADU an inspection will be required.

Note: When recording the AFUE in EECP, no decimals need to be entered.



4 AGREEMENT AND SIGNATURE

Licensed Contractors Only

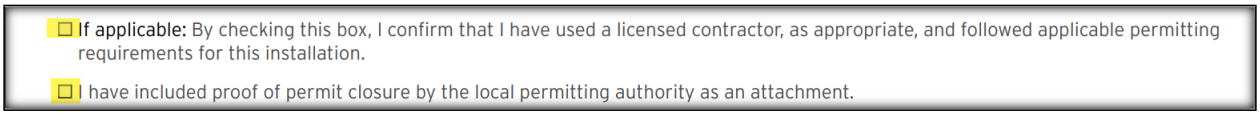
I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR REBATE ARE INSTALLED AND OPERATIONAL AND MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

☐ If applicable: By checking this box, I certify I am a licensed contractor and have followed applicable permitting requirements, as appropriate, for this HVAC installation or replacement.

Contractor Signature | Permit Number | Date (mm/dd/yy)

Licensed Contractor Box at bottom of application MUST be checked by contractor as well as signed, permit number, and date for **Furnaces only**. The permit number MUST be on the application.

Permit number: it is not necessary to validate the permit number in any database. Permit number MUST be provided in the filed assigned on the paper application as well as in a Closed Permit document.



☐ If applicable: By checking this box, I confirm that I have used a licensed contractor, as appropriate, and followed applicable permitting requirements for this installation.

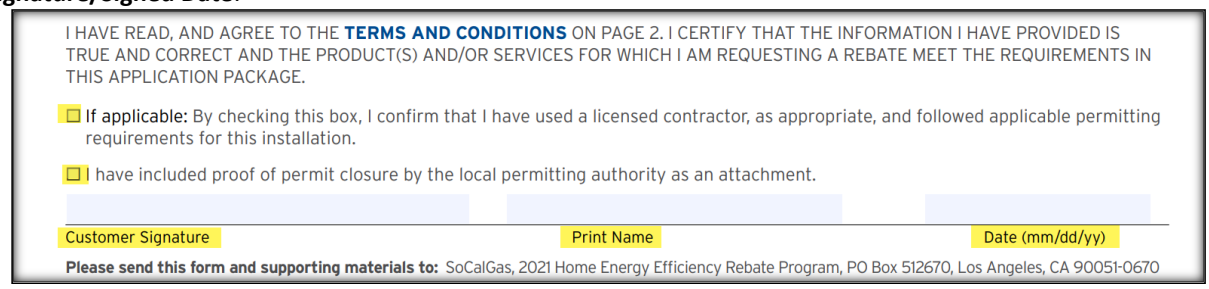
☐ I have included proof of permit closure by the local permitting authority as an attachment.

The customer **MUST** also provide validation for the furnaces. They will need to check both boxes above the signature. If they did not check the box on the customer section, then the customer **MUST** provide updated paper application for the application to move forward. Oral confirmation is not valid.

- If box for "I have included proof of permit closure by the local permitting authority as an attachment" is not checked, but the customer provided a copy of their permit per PA it is okay to proceed with the application.

Customer **MUST** submit a copy of a 'closed' permit to get a rebate. Because each building department is different and their permit there is no standard form to follow as far as what a permit looks like. The key item to look for is sign off from the inspector (a couple of the samples have that) or 'closed' as a guide. Again, we do not validate the permit number or authenticate the closed permit, we just follow what is asked. Examples of Acceptable permits can be found in the Appendix.

Signature/Signed Date:



I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR WHICH I AM REQUESTING A REBATE MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

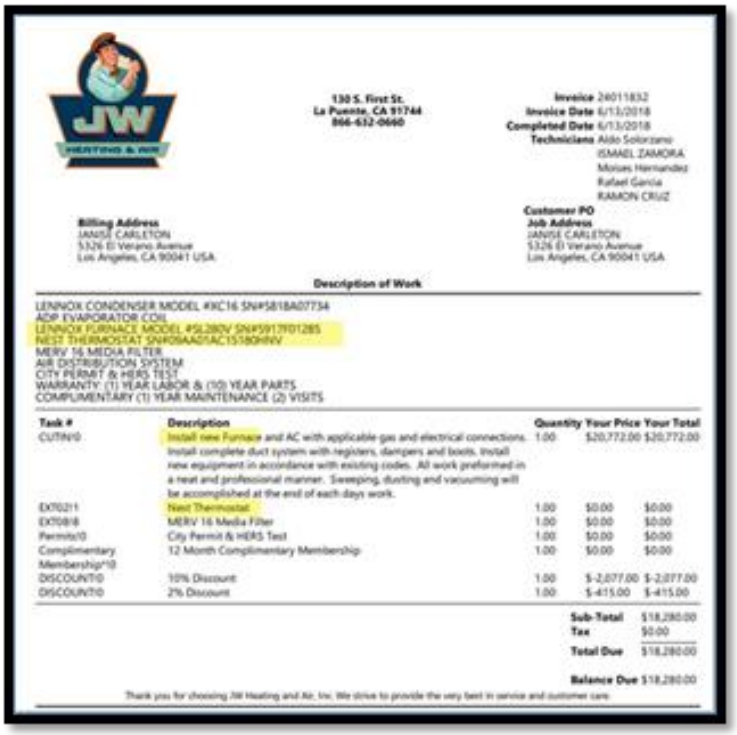
☐ If applicable: By checking this box, I confirm that I have used a licensed contractor, as appropriate, and followed applicable permitting requirements for this installation.

☐ I have included proof of permit closure by the local permitting authority as an attachment.

Customer Signature | Print Name | Date (mm/dd/yy)

Please send this form and supporting materials to: SoCalGas, 2021 Home Energy Efficiency Rebate Program, PO Box 512670, Los Angeles, CA 90051-0670

Furnace bundles: Furnaces usually do not display the individual purchase price due to vendor's policies. If the furnace is recorded on the invoice as part of a bundle or "project", notes MUST be entered in EECP stating individual purchase price is included in the entire project scope. There is no need to call the contractor or customer to validate individual purchase price for these instances. ***It is acceptable to proceed if the proof of purchase reflects a "bundled" pricing for both units.*** Please see example:



JW HEATING & AIR

130 S. First St.
La Puente, CA 91744
866-632-0660

Invoice 24011832
Invoice Date 6/13/2018
Completed Date 6/13/2018
Technicians Aldo Solorzano
ISMAEL ZAMORA
Moises Hernandez
Rafael Garcia
RAMON CRUZ

Billing Address
JANISE CARLETON
5326 El Verano Avenue
Los Angeles, CA 90041 USA

Customer PO
Job Address
JANISE CARLETON
5326 El Verano Avenue
Los Angeles, CA 90041 USA

Description of Work

LENNOX CONDENSER MODEL #XC16 SN#5818A07734
ADP EVAPORATOR COIL
LENNOX FURNACE MODEL #SL280V SN#5917F01285
NEST THERMOSTAT SN#09AAD1AC1578BHNV
MERV 16 MEDIA FILTER
AIR DISTRIBUTION SYSTEM
CITY PERMIT & HERS TEST
WARRANTY: (1) YEAR LABOR & (10) YEAR PARTS
COMPLIMENTARY (1) YEAR MAINTENANCE (2) VISITS

Task #	Description	Quantity	Your Price	Your Total
CUTIN10	Install new Furnace and AC with applicable gas and electrical connections. Install complete duct system with registers, dampers and boots. Install new equipment in accordance with existing codes. All work preformed in a neat and professional manner. Sweeping, dusting and vacuuming will be accomplished at the end of each days work.	1.00	$20,772.00	$20,772.00
EXT0211	Nest Thermostat	1.00	$0.00	$0.00
EXT0818	MERV 16 Media Filter	1.00	$0.00	$0.00
Permits10	City Permit & HERS Test	1.00	$0.00	$0.00
Complimentary Membership*10	12 Month Complimentary Membership	1.00	$0.00	$0.00
DISCOUNT10	10% Discount	1.00	$-2,077.00	$-2,077.00
DISCOUNT10	2% Discount	1.00	$-415.00	$-415.00

Sub-Total $18,280.00
Tax $0.00
Total Due $18,280.00
Balance Due $18,280.00

Thank you for choosing JW Heating and Air, Inc. We strive to provide the very best in service and customer care.

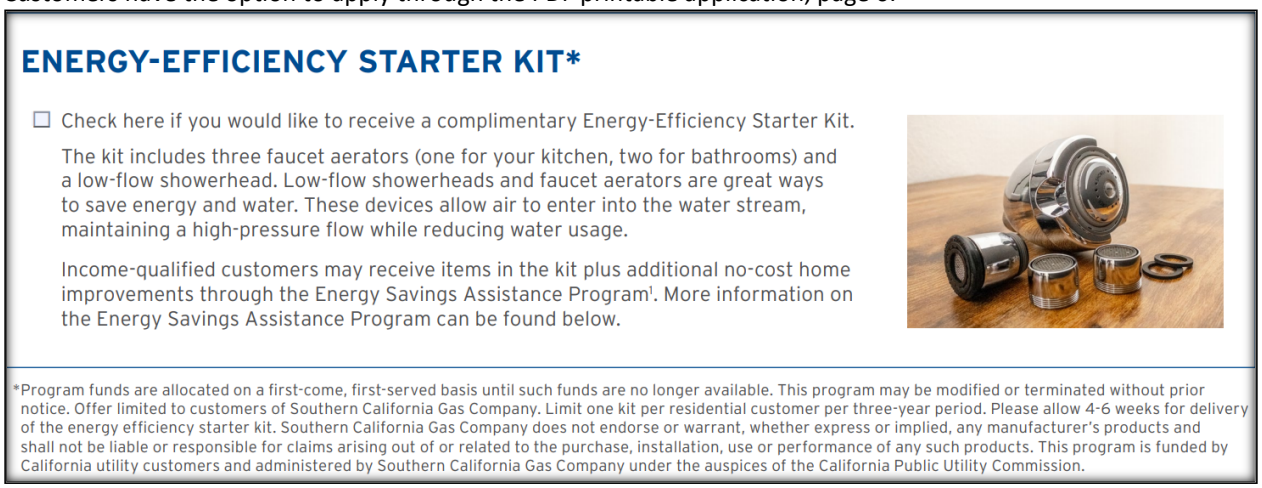
If Double Dip is detected for the Res HVAC Upstream: REEP will pay and claim savings. Please see the Res Hvac Upstream Double Dip under the Double Dip section of this document.

ENERGY EFFICIENCY STARTER KIT

SoCalGas's 2021 Residential Rebate application offers customers the opportunity to apply for an Energy Efficiency Starter Kit.

The kit includes three faucets' aerators (one for the kitchen, two for bathrooms) and a low-flow showerhead. Low-flow showerheads and faucet aerators are great ways to save energy and water. These devices allow air to enter the water stream, maintaining a high-pressure flow while reducing water usage.

Customers have the option to apply through the PDF printable application, page 6:



ENERGY-EFFICIENCY STARTER KIT*

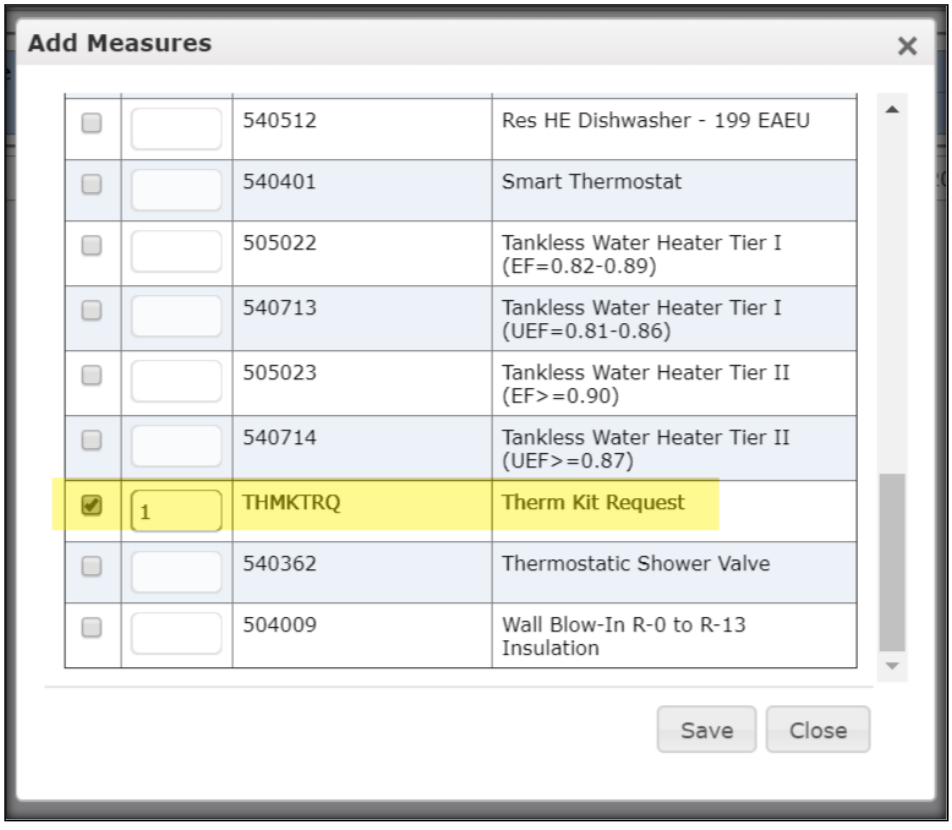
☐ Check here if you would like to receive a complimentary Energy-Efficiency Starter Kit.

The kit includes three faucet aerators (one for your kitchen, two for bathrooms) and a low-flow showerhead. Low-flow showerheads and faucet aerators are great ways to save energy and water. These devices allow air to enter into the water stream, maintaining a high-pressure flow while reducing water usage.

Income-qualified customers may receive items in the kit plus additional no-cost home improvements through the Energy Savings Assistance Program[1]. More information on the Energy Savings Assistance Program can be found below.

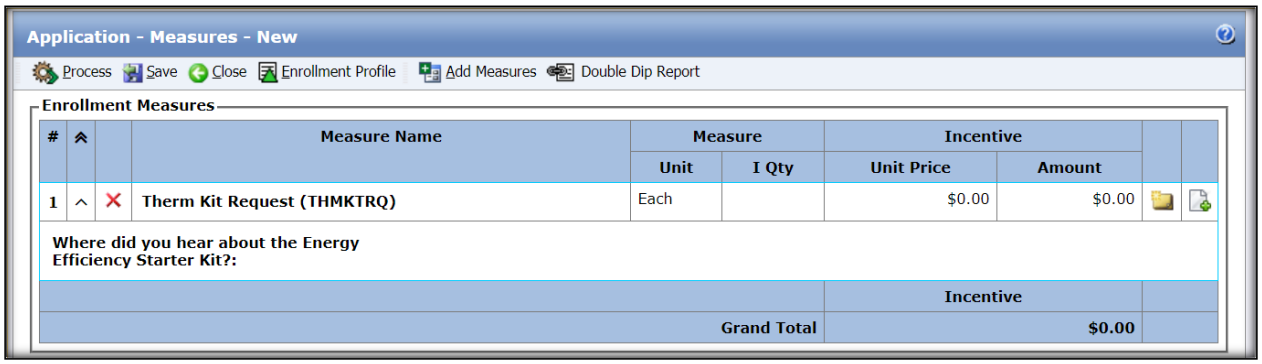
*Program funds are allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. Offer limited to customers of Southern California Gas Company. Limit one kit per residential customer per three-year period. Please allow 4-6 weeks for delivery of the energy efficiency starter kit. Southern California Gas Company does not endorse or warrant, whether express or implied, any manufacturer's products and shall not be liable or responsible for claims arising out of or related to the purchase, installation, use or performance of any such products. This program is funded by California utility customers and administered by Southern California Gas Company under the auspices of the California Public Utility Commission.

As the application is reviewed by SoCal Gas Processing staff, the "Therm Kit Request (THMKTRQ)" measure will be selected from the Measure List:



Customers can also apply for the Therm Kit on the online application.

As the mail in/online application is reviewed by the SoCalGas Processing staff, the Therm Kit Request will show in the measures tab as follows:



1. SCG Processing staff will review double dipping for Therm Kit Request
2. Processing staff MUST leave the Therm Kit information intact, as requested by the customer
3. No additional documentation is necessary from the customer to validate or prequalify the Therm Kit Request.
4. No savings/incentive will be tied to this measure
5. No inspections will be conducted for Therm Kits
6. Double Dipping timeframe is 3 years
7. A report will be generated automatically from EECP to be delivered to the PM, Harvey Bringas. He oversees ensuring these kits are sent to the customer when they see the measure "Therm Kit Request" has been added to an enrollment.

Solar Thermal Water Heater

New measure effective 11/29/2021 and can be applied through the link here. A customer CANNOT apply for multiple solar thermal water heaters.

Current Solar Water Heater Rebates- Effective 11/29/2021:

ENERGY STAR® SOLAR THERMAL WATER HEATING SYSTEM

Certified ENERGY STAR® Solar Water Heating Systems must have a Solar Uniform Energy Factor **(SUEF) of 1.8 or greater**.

- ENERGY STAR® Solar Thermal Water Heating System with an ENERGY STAR® Storage Gas backup (up to 55 gallons) replacing a Storage Gas Water Heater - **$3,500 rebate**
- ENERGY STAR® Solar Thermal Water Heating System with a .82 UEF or above Tankless Gas backup replacing a Storage Gas Water Heater - **$4,500 rebate**
- ENERGY STAR® Solar Water Heating System with a .82 UEF or above Tankless Gas backup replacing a Tankless Gas Water Heater - **$4,500 rebate**

1. **What date is the Solar Thermal WH rebate effective?**
 a. November 29, 2021
2. **What if a customer purchased a Solar Thermal system and/or back up WH prior to November 29, 2021?**
 a. DNQ - Both measures must be purchased and installed after November 29, 2021 in order to qualify.
3. **How does the customer apply?**
 a. Customers must submit a reservation prior to submitting their rebate application.

i. Customer will have 90 days from the time that they submitted the reservation to apply for the rebate. If we have not received a rebate application after 60 days, EECP will send an auto-reminder notifying the customer they have 30 days left. After 90 days, if we have not received an application, EECP will automatically cancel the enrollment and the customer will have to re-apply (submit new reservation).

b. Once processor reviews reservation, email confirmation is sent to customer which contains the online link they can use to apply.

4. What platforms can they apply on?

a. Reservation- Online only

b. Rebate Application- Online only (application link sent after processor reviews/processes reservation)

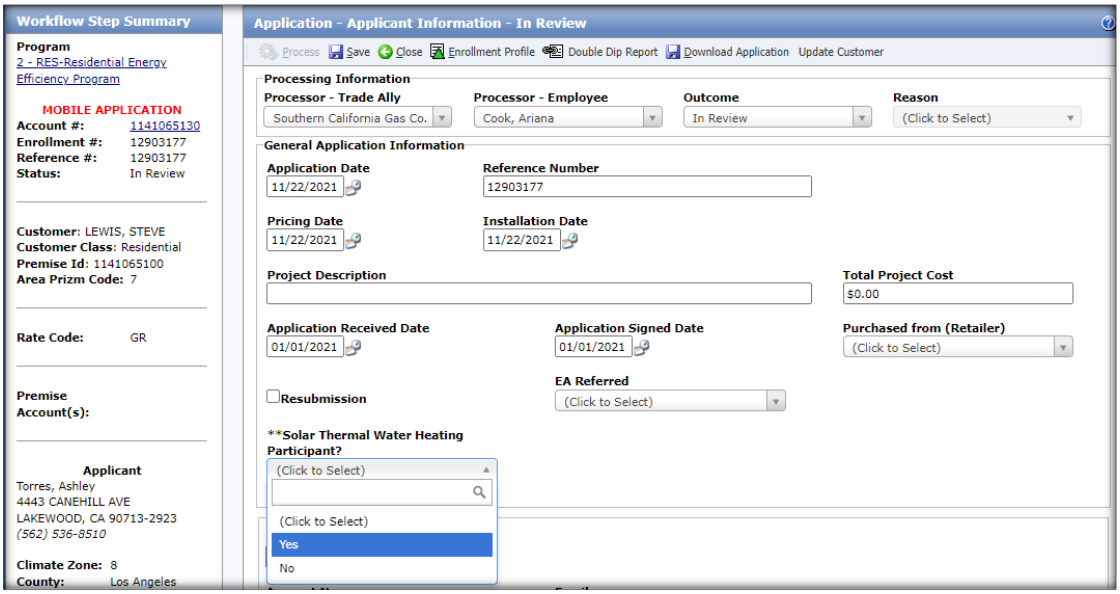
5. Does the customer qualify for both the Solar Water Heating rebate and separate Storage or TWH rebate?

a. No, the customer would only qualify for the Solar Water Heating rebate. The additional incentive for the Storage or TWH is already included in the Solar Water Heating incentive.

6. How do I process a Solar WH reservation?

a. On the Application Workflow, select "Yes" in the Solar Thermal Water Heating Participant drop down and click Save and Process.

i. This will activate the installation workflow and automatically send an email to the customer with the online application link.



7. How do we process these Online applications?

a. You would follow standard Online app procedures aside from other Solar WH requirements

i. Reservation required

ii. Photo of Solar Collector required

iii. Photo of new Water Heater required

8. Do the pictures need to be geo-tagged?

a. Although pictures are not required to be geo-tagged, we will follow current procedure when enrollment is selected for inspection. If geo-tagged, ok to office pass.

9. Is a permit mandatory for the Solar WH install?

a. No, a permit is not mandatory. If they include one and it is missing what we look for on the Furnace permits, it is ok to proceed with processing the application (no need to request updated permit).

10. Is this rebate available for Multi-Family?

a. No, Single Family only

11. Can a customer submit multiple reservations and/or rebate applications for the same account?

a. Yes, however, customer would only qualify if they have two Tankless WH that are in separate locations (two TWH next to each other would not qualify). The application specifies limit one per household so we would make internal exceptions for this scenario.

12. If a customer had an electric water heater and wants to switch to natural gas, do they qualify?

a. No, only customers with an existing natural gas water heater qualify.

13. What are the efficiency requirements for the Solar system?

a. In order to qualify for the rebate, Certified ENERGY STAR® Solar Water Heating Systems must have a Solar Uniform Energy Factor (SUEF) of 1.8 or greater.

b. Please see "How to verify Solar system efficiency" instructions below

14. What are the efficiency requirements for the new water heater?

a. New Storage water heater must be ENERGY STAR® Certified (up to 55 gallons)

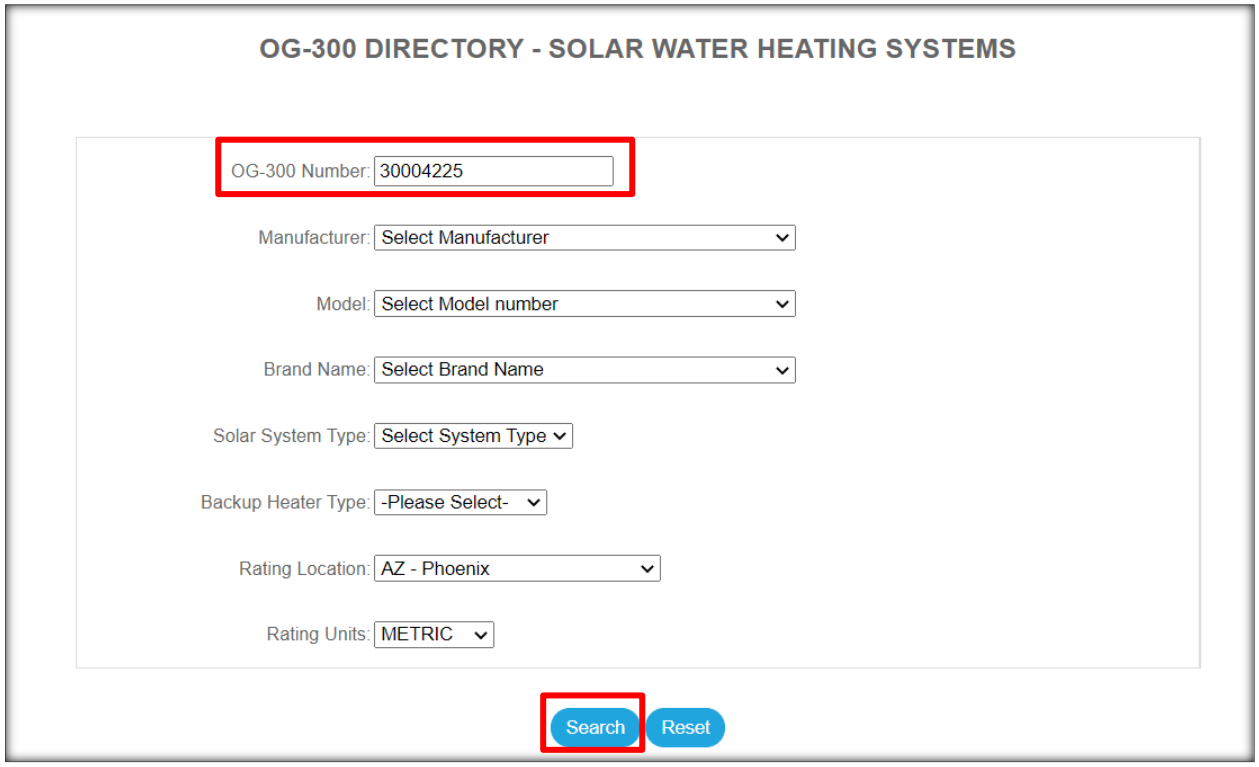
b. New Tankless, it must be ENERGY STAR® certified with a UEF of .82 or greater. Effective 02/16/22 the new UEF is .87.

15. Does the efficiency of the previous water heater matter?

a. No, we are not concerned with the old water heater's efficiency

HOW TO VERIFY SOLAR SYSTEM EFFICIENCY:

1. Go to Directory (solar-rating.org) **enter OG-300 number (e.g., 30004225) and click search**



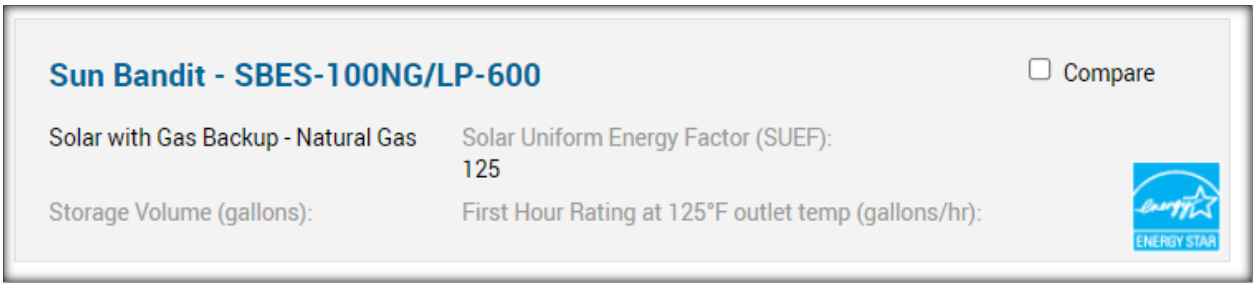
2. Model # will appear and Back Up Type will appear

a. Example below shows Gas Tank which means customer should have installed a Storage Water Heater with this Model.

i. If for some reason you see that the customer installed Solar System with incorrect backup type, reach out to Program Advisor.

OG-300 Number	Manufacturer	Brand Name	Model	Solar System Type	Backup Heater Type	[AZ - Phoenix] Solar Fraction (SF)	Canada Single Day Savings	ENERGY STAR®	Expiration Date
30004225	Sun Bandit, LLC.	Sun Bandit	SBES-100NG/LP-600	ICS	Gas Tank	0.59	5.52		10/01/21

3. **Processor then goes to** [ENERGY STAR Certified Water Heaters | EPA ENERGY STAR](#) **and searches QPL for the model #.**
 a. Make sure filters are set to “Solar with Gas Backup”
4. **Once you find model #, verify SUEF is 1.8 or greater.**
 a. If model # is not on the list, reach out to Program Advisor before DNQ.



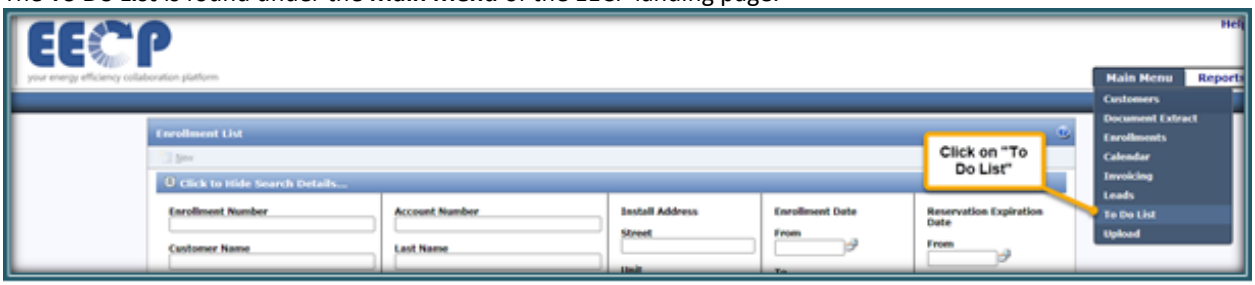
To Do List

DESCRIPTION

To provide the best service to our customers, processors will aim to complete the following list of tasks daily. These items are listed according to their priority with Corrections taking no longer than 1 business day to complete. When working on the following enrollments, ensure that all workflows are either completed/closed or on the proper On Hold status. Note: it is important to search for each item by all methods to ensure no application or workflow is missed.

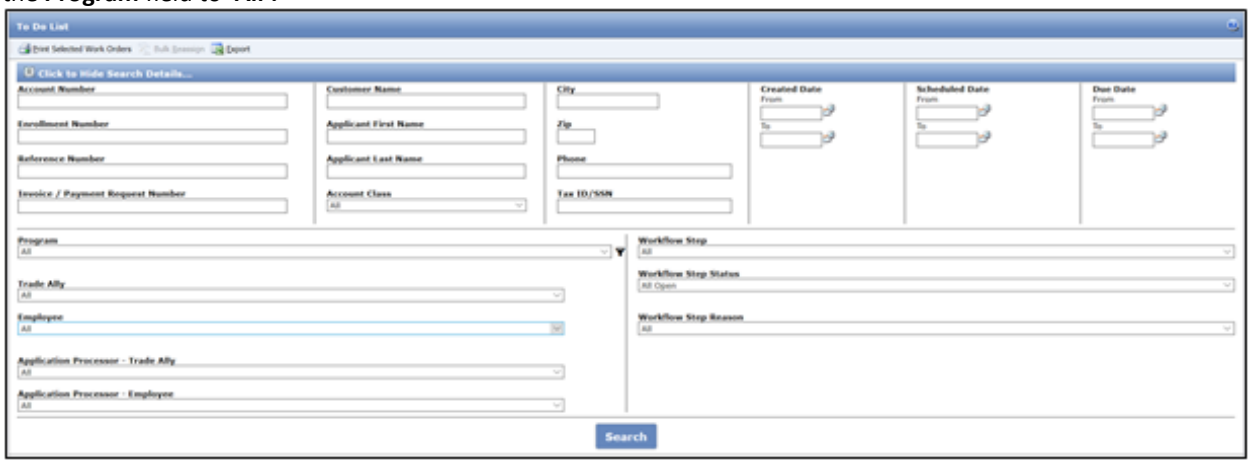
ACCESSING THE TO DO LIST

The **To Do List** is found under the **Main Menu** of the EECP landing page.



The next image shows the **To Do List**, where the filters can be adjusted to search for pending enrollments/workflows.

Ensure all programs you process for are reviewed by utilizing the **Program** field. It's best practice to change the **Program** field to **'All'.**



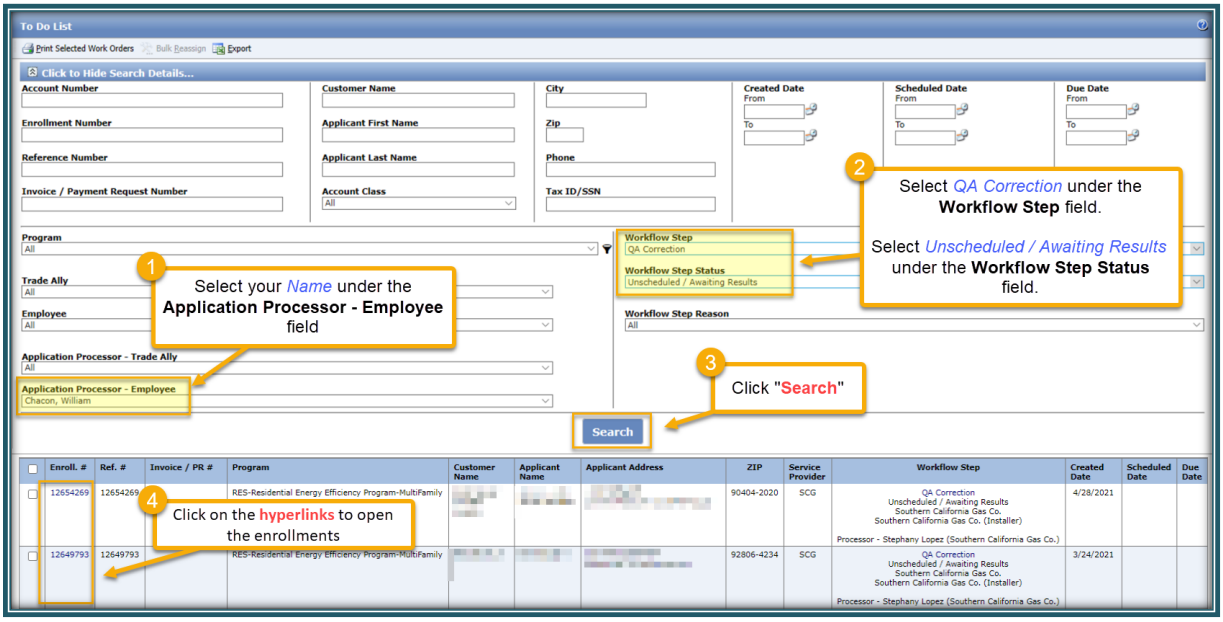
QA Corrections

QA Corrections are enrollments which were processed but failed a **QA Review**. These enrollments will be completed by accessing the **QA Correction** workflow and amending the enrollment based on the instructions given by the QA Team.

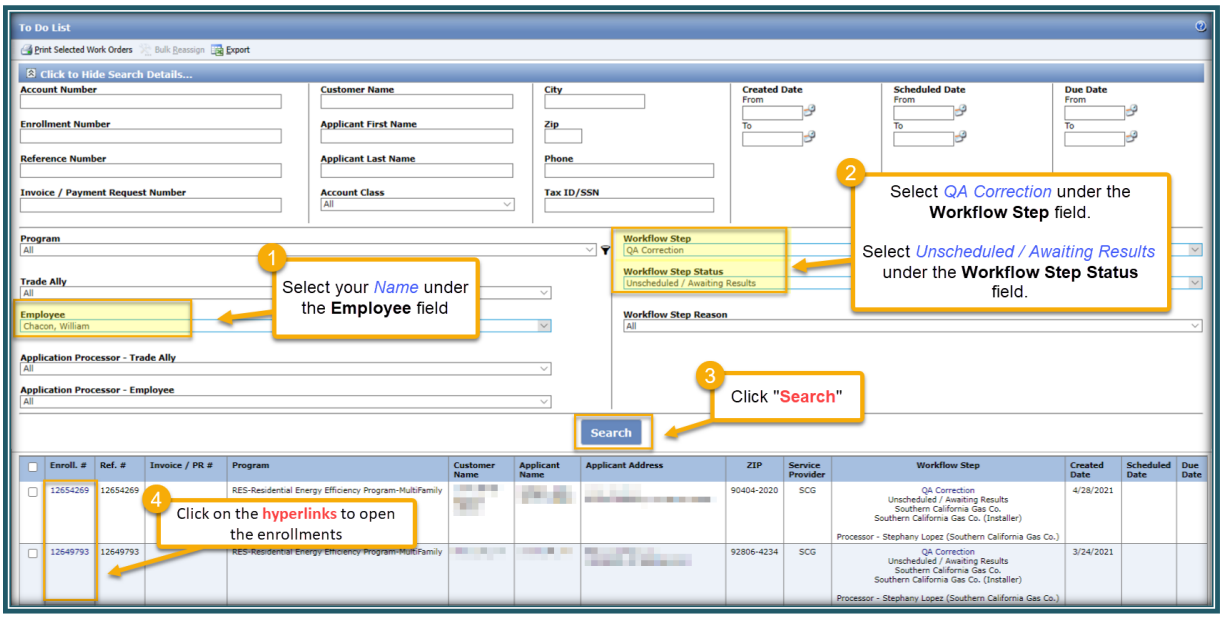
Accessing QA Correction Workflows

To access the **QA Corrections** the processor will follow the steps below:

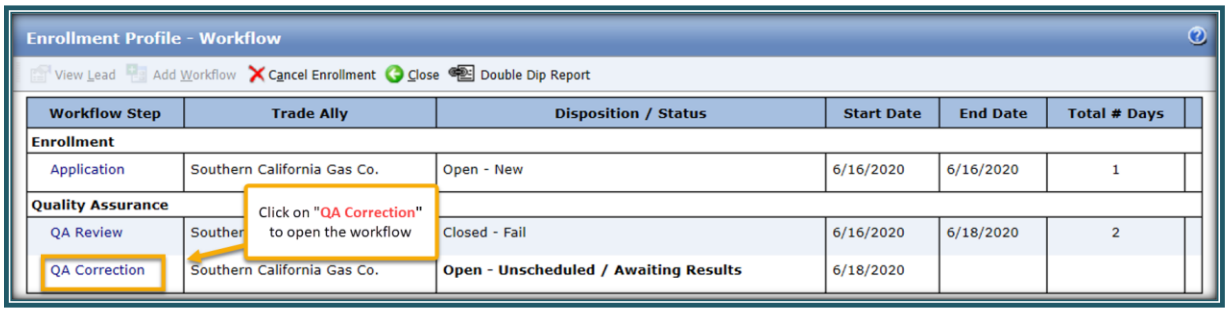
Method 1:



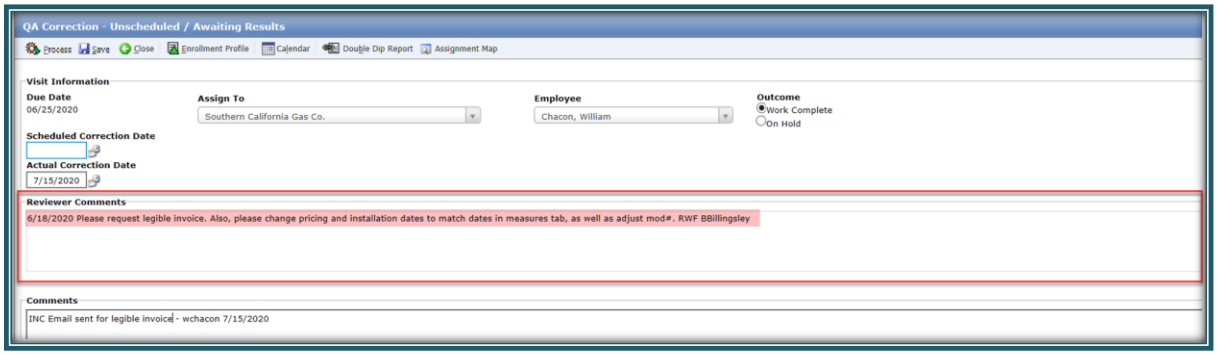
Method 2:



COMPLETING QA CORRECTIONS

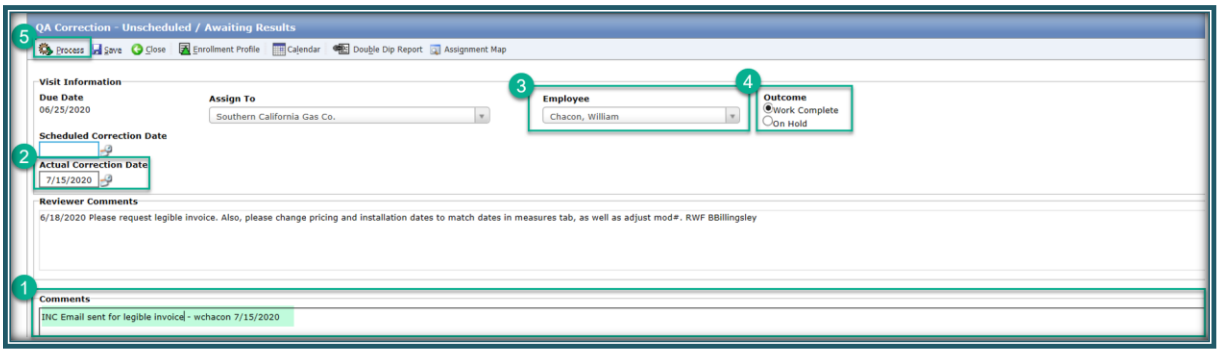


Read the **Reviewer Comments** section.

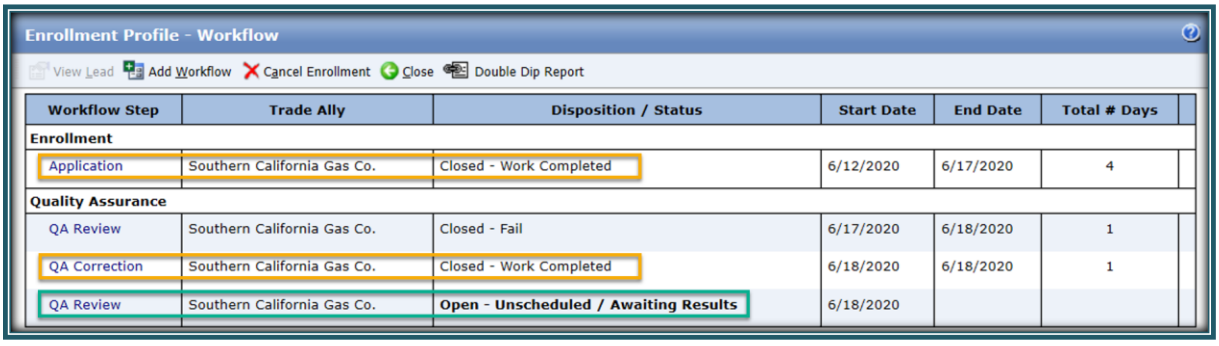


If QA Correction can be completed, make sure to update any relevant fields in the **Application** workflow and process as normal.

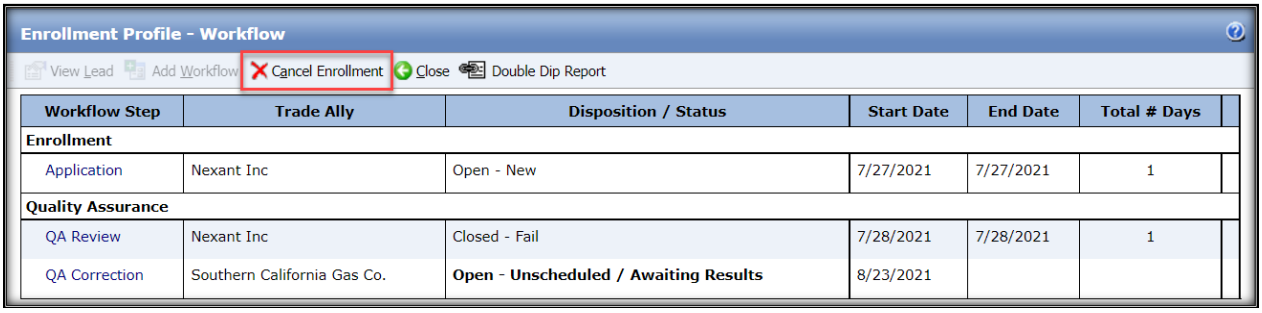
Go back to the **QA Correction** workflow and notate the resolution/action taken under the **Comments** section. Enter the date the correction was completed in the **Actual Correction Date**. Add your **Employee** name & change **Outcome** to *Work Complete.* Lastly, hit the "***Process***" button.



Ensure **ALL** workflows are **Closed – Work Completed** excluding the new **QA Review** workflow (see image below).



If the enrollment requires additional documentation as stated in the QA Correction's Reviewer Comments, processor will cancel the enrollment from the Enrollment Profile – Workflow and send the appropriate INC email asking the customer to reapply and provide the missing information



Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days
Enrollment					
Application	Nexant Inc	Open - New	7/27/2021	7/27/2021	1
Quality Assurance					
QA Review	Nexant Inc	Closed - Fail	7/28/2021	7/28/2021	1
QA Correction	Southern California Gas Co.	**Open - Unscheduled / Awaiting Results**	8/23/2021		

FYI: Depending on the processor's EECP email subscriptions, every day they will receive a report from donotreply-scg-eecp-rs@directtechnology.com listing the applications they have on hold.

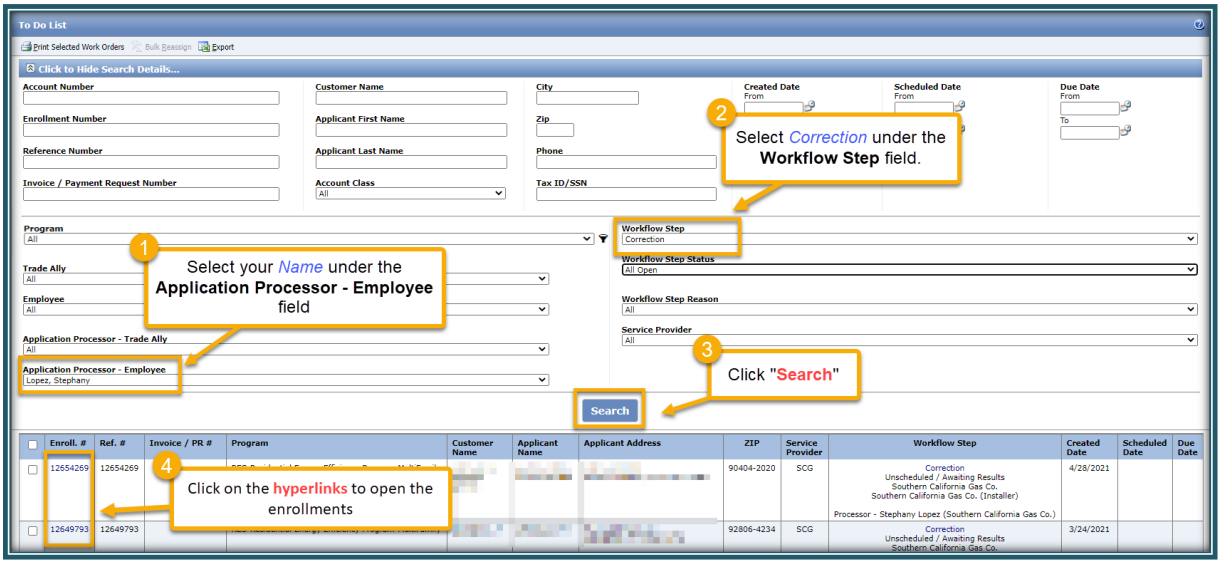
CORRECTIONS

The purpose of this workflow is to identify enrollments which were unable to complete an inspection or enrollments with measures that failed an inspection. This workflow is also used to trigger a reinspection if the customer requested one, or to make adjustments to measures if the inspection determined there was a fail or partial fail for one or more of the measures.

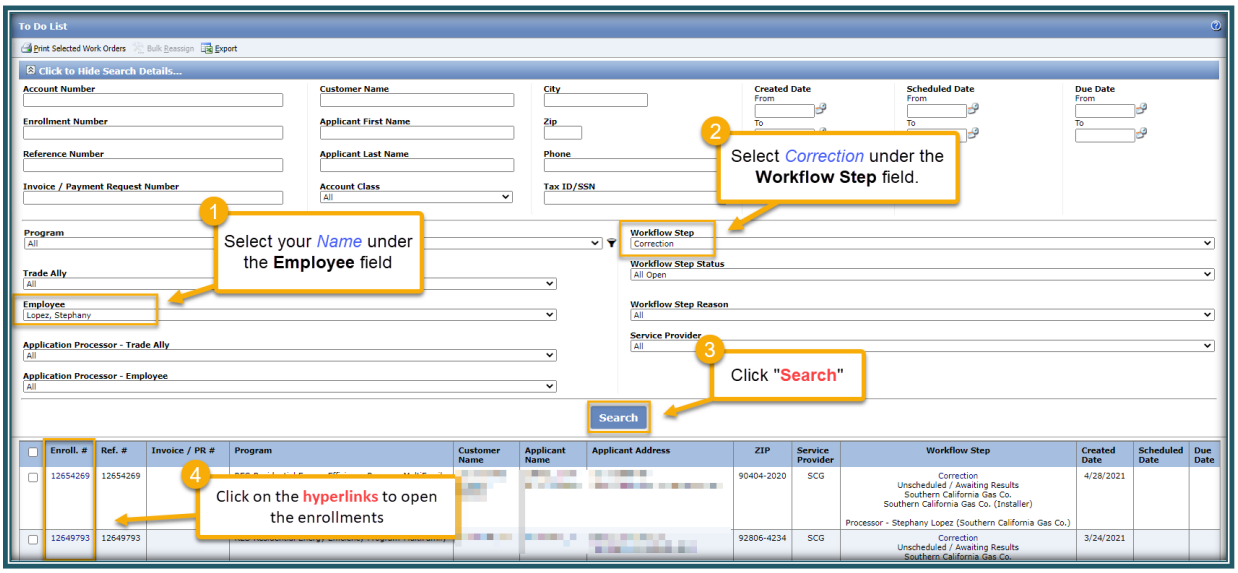
ACCESSING CORRECTION WORKFLOWS

To access **Corrections** the processor will follow the steps below:

Method 1:

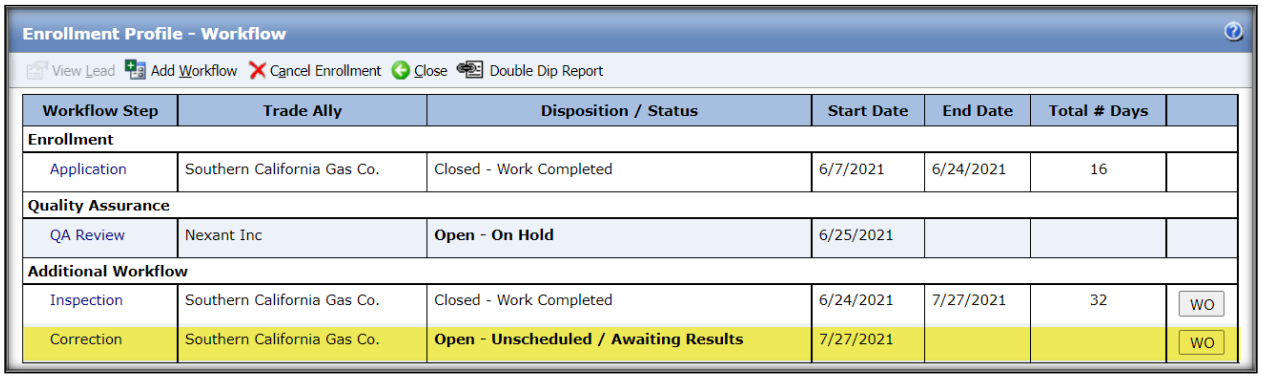


Method 2:



HOW TO COMPLETE CORRECTIONS: "CORRECTION NOT COMPLETED" VS "CORRECTION COMPLETED"

The enrollment will display the **Correction** Workflow:

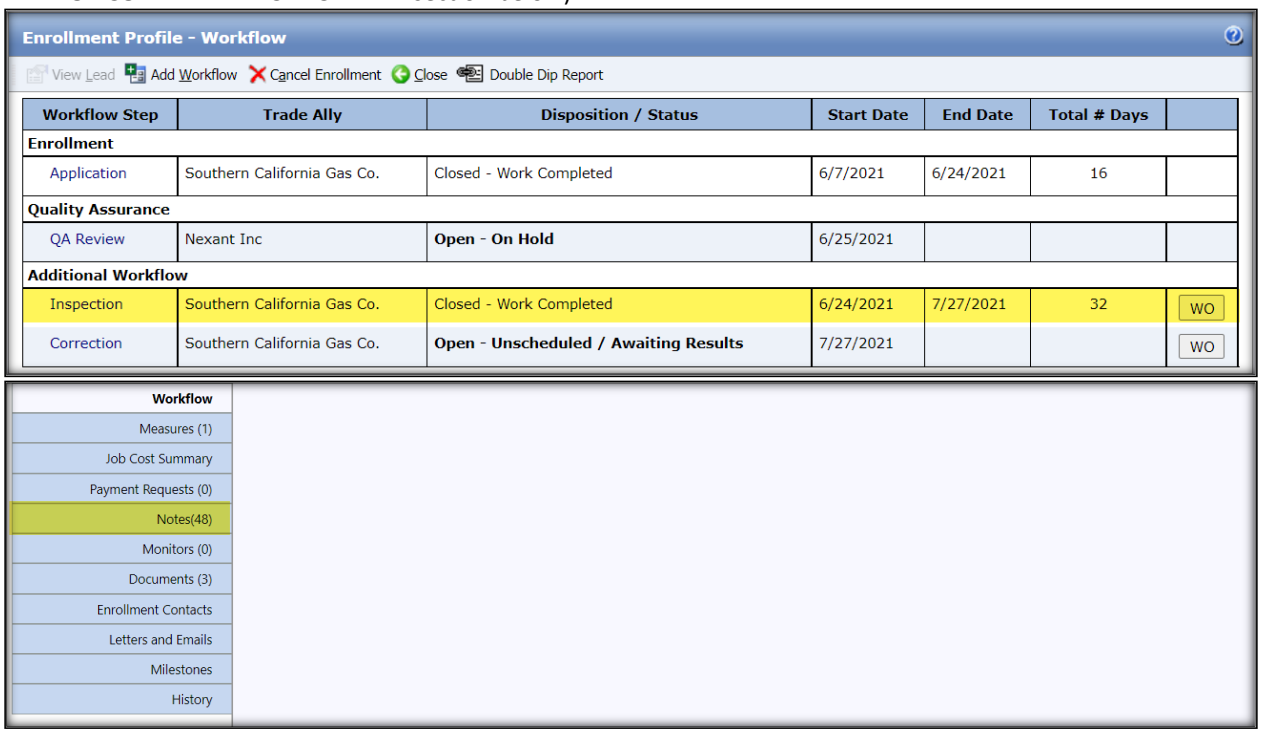


Enrollment Profile - Workflow

View Lead | Add Workflow | Cancel Enrollment | Close | Double Dip Report

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days	
Enrollment						
Application	Southern California Gas Co.	Closed - Work Completed	6/7/2021	6/24/2021	16	
Quality Assurance						
QA Review	Nexant Inc	**Open - On Hold**	6/25/2021			
Additional Workflow						
Inspection	Southern California Gas Co.	Closed - Work Completed	6/24/2021	7/27/2021	32	WO
Correction	Southern California Gas Co.	**Open - Unscheduled / Awaiting Results**	7/27/2021			WO

1. You will open the **Inspection Workflow** under the Additional Workflow and go to the **Notes** section from the Enrollment Profile. From there read the notes provided by the Inspection Specialist in both places. (If the Inspectors Notes indicate **Refused**, **CGI (Could Not Get In)**, **or Unresponsive** proceed to the "**CORRECTION NOT COMPLETED – CANCELLED"** section below):



Enrollment Profile - Workflow

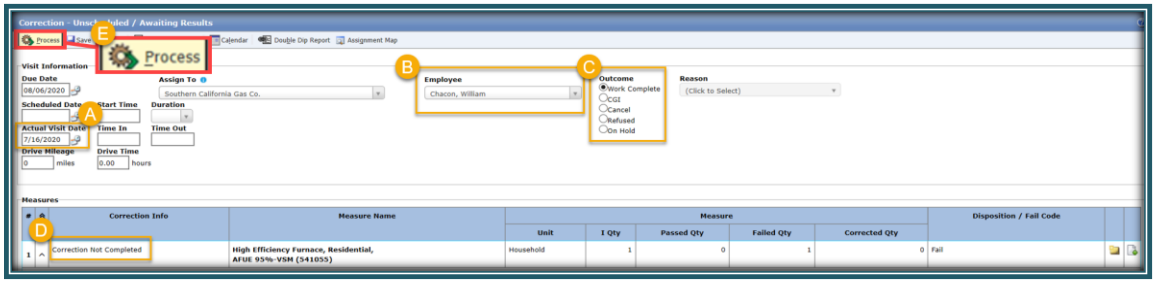
View Lead | Add Workflow | Cancel Enrollment | Close | Double Dip Report

Workflow Step	Trade Ally	Disposition / Status	Start Date	End Date	Total # Days	
Enrollment						
Application	Southern California Gas Co.	Closed - Work Completed	6/7/2021	6/24/2021	16	
Quality Assurance						
QA Review	Nexant Inc	**Open - On Hold**	6/25/2021			
Additional Workflow						
Inspection	Southern California Gas Co.	Closed - Work Completed	6/24/2021	7/27/2021	32	WO
Correction	Southern California Gas Co.	**Open - Unscheduled / Awaiting Results**	7/27/2021			WO

2. If there is a discrepancy, e-mail the **Inspection Specialist** and CC **Processing and Quality Assurance Team Lead**. If all the information matches, proceed with next steps:

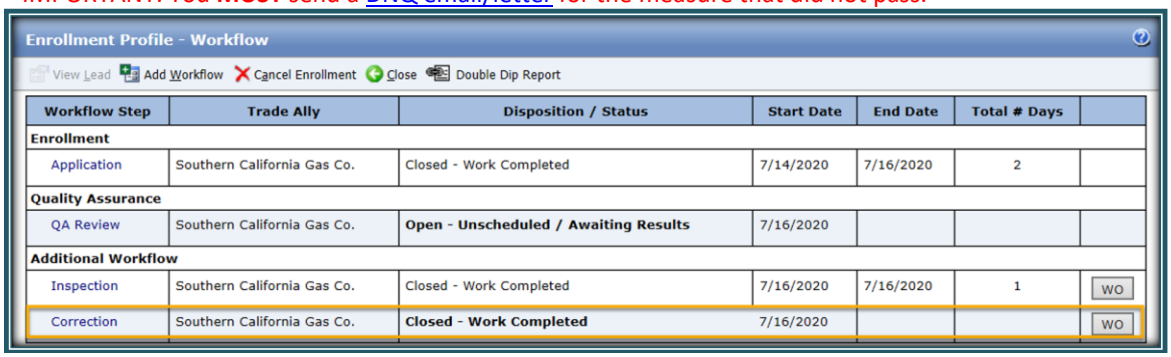
CORRECTION NOT COMPLETED – PROCESSED

This occurs when the enrollment is a partial pass (Ex. Applied for 2 Tankless Water Heaters and only 1 passed)



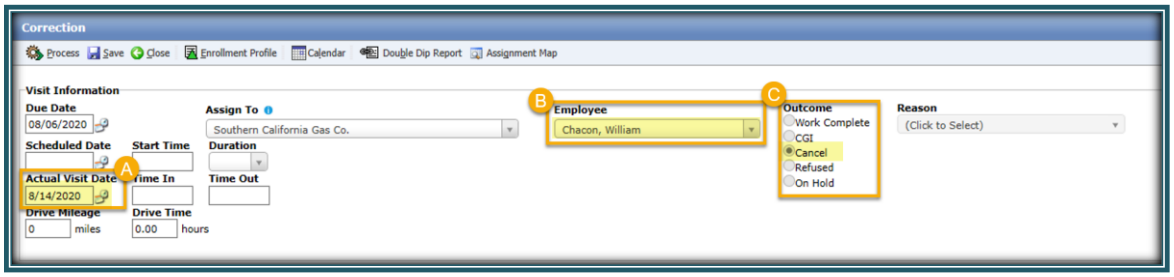
A. Add the **Actual Visit Date** (date the processor is completing the Correction Workflow).
B. Ensure your **Name** is listed as the processor
C. Ensure the Outcome **Worked Completed** is selected.
D. Select "**Correction Not Completed"** from the drop-down menu under **Correction** Info.
E. Click **PROCESS** then verify if the **Job Cost Summary** is showing the correct amount to be paid. The **Correction** workflow is now complete.

IMPORTANT: You **MUST** send a DNQ email/letter for the measure that did not pass.

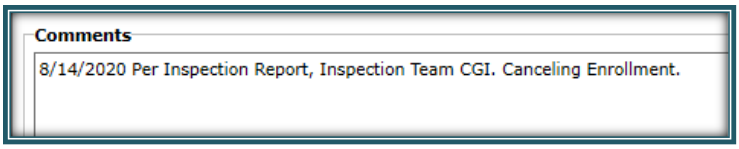


CORRECTION NOT COMPLETED – CANCELLED

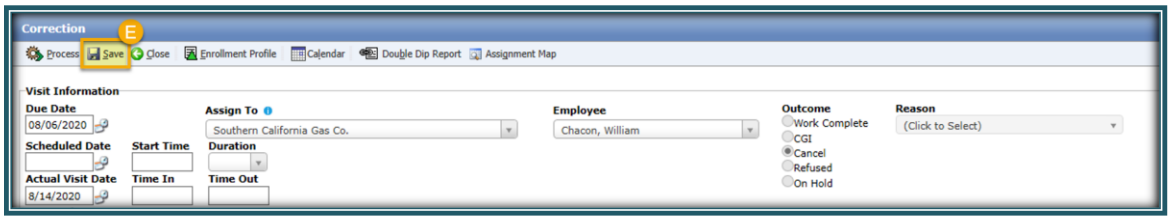
If an inspection was cancelled, failed 100% or could not be completed, the **Correction** workflow will be **SAVED** with the **Cancel** outcome. The processor will then **Cancel** the application from the **Enrollment Profile**. This allows the **Inspection Specialist** to **reopen** the **Correction** workflow if the customer requests a reinspection. Follow these guidelines to cancel **Correction** workflows:



A. Fill in the **Actual Visit Date** with Today's Date.
B. Select your name under **Employee.**
C. Select the **Cancel** under outcome.



D. Enter a note under the **Comments** section, detailing why the enrollment was cancelled.



E. Save the **Correction** workflow

F. Follow the guidelines on HOW TO CANCEL AN ENROLLMENT IN EECP

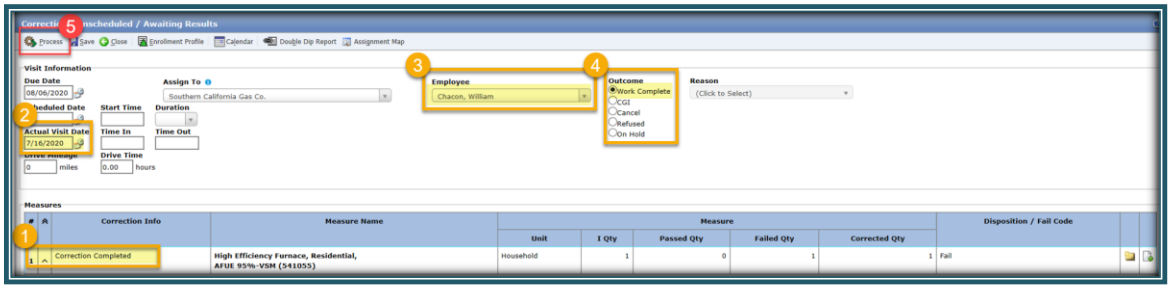
G. Send the appropriate **DNQ email/letter** to the customer.

CORRECTION COMPLETED – RE-INSPECTIONS

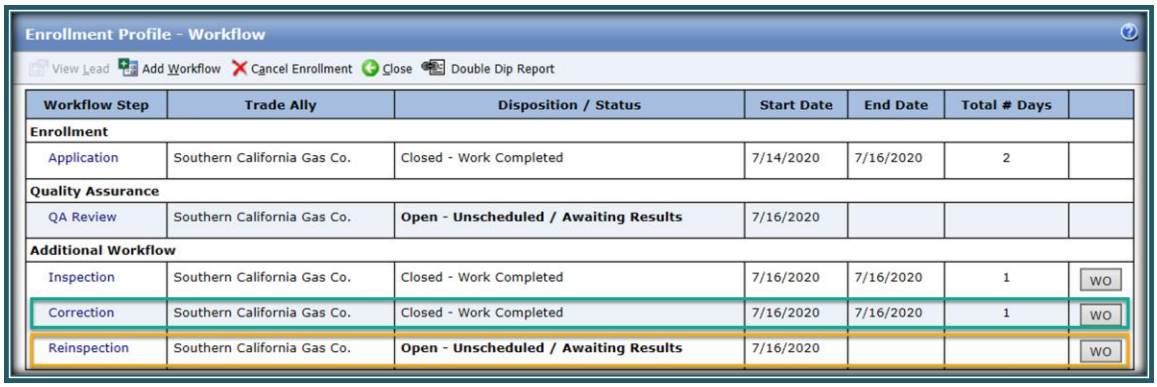
Only use this option in the instances where the application needs a **re-inspection**.

Follow the steps below:

1. Send a **Re-open ticket** to the **Inspection Specialist** for the **Correction** workflow.
2. Annotate the enrollment under the **Notes** section, indicating that the ticket has been sent at the customer's request
3. Once request has been fulfilled come back and open the **Correction** workflow



- Select **Correction Completed** from the drop-down menu under the **Correction** Info
- Complete the **Actual Visit Date** (date the processor is completing the **Correction** workflow)
- Ensure your **Name** is listed as the processor
- The Outcome will be **Work Completed**.
- Click **PROCESS** then verify if the **Job Cost Summary** is showing the correct amount to be paid. The **Correction** workflow is now complete.



This will auto populate a **Re-inspection** workflow: Once the results from inspections are received, the review process restarts; the application will either pass or fail inspection. If the application fails again, a **NEW Correction** Workflow will populate, and it will have to be reviewed according to the guidelines stated above.

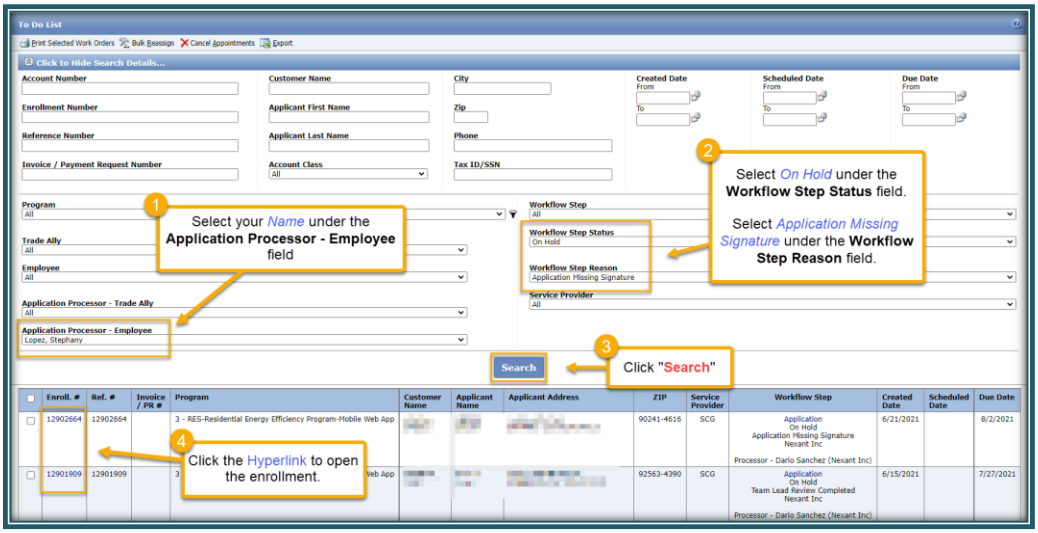
On Hold – Application Missing Signature

The purpose for using the status **On Hold – Application Missing Signature** is to identify mail in applications that are missing the applicant's signature. When placing the enrollment under this status, it provides the customer access to sign their application electronically via the "Check Status" link or allow them to resubmit the mail in application with the required signature.

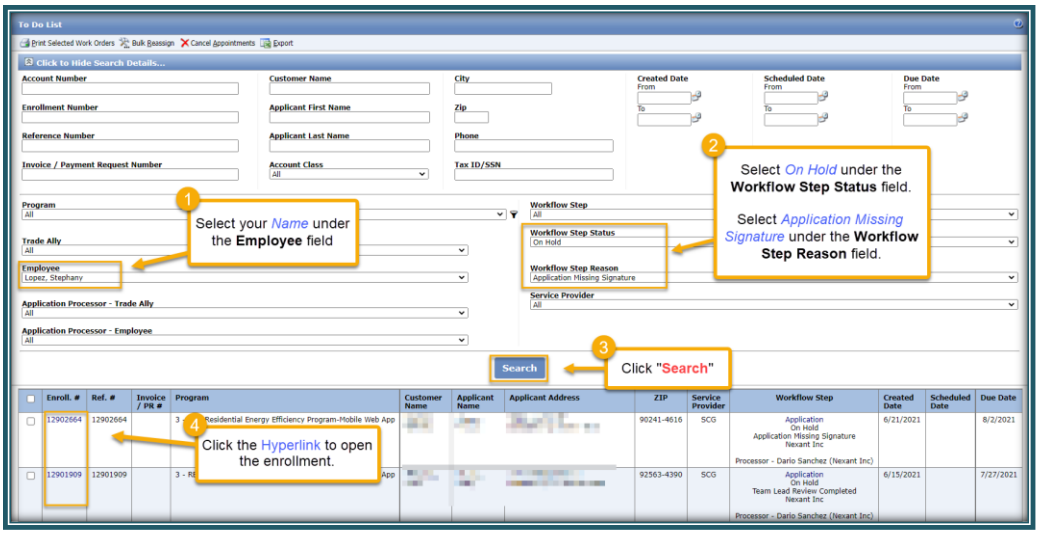
Accessing On Hold - Application Missing Signature Workflows

To access **On Hold – Application Missing Signature** the processor will follow the steps below:

Method 1:

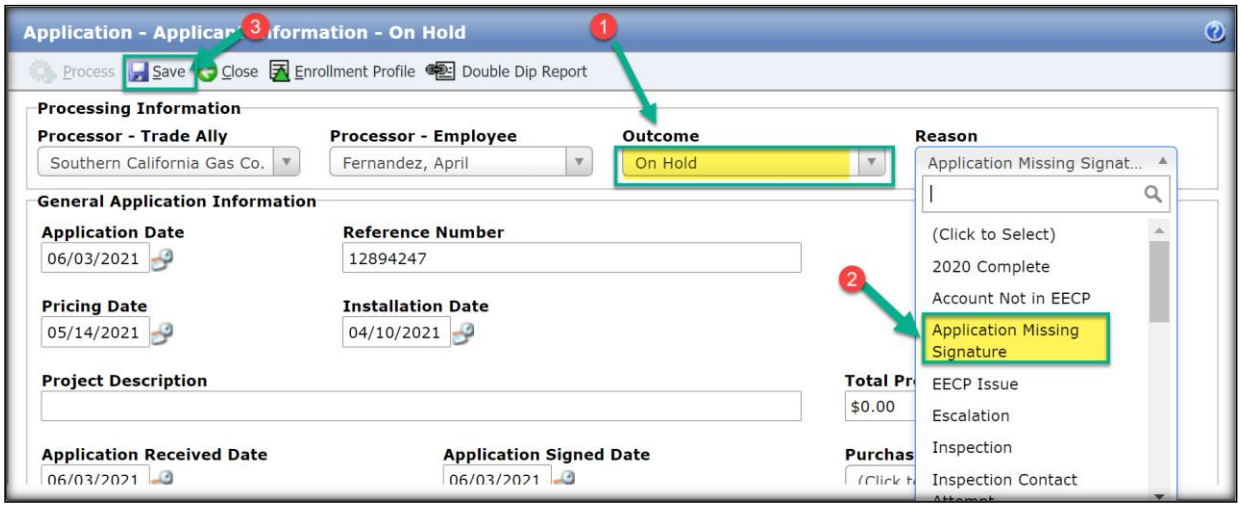


Method 2:



PLACING AN ENROLLMENT ON HOLD – APPLICATION MISSING SIGNATURE

To place the application on this status the processor will set the status to On Hold followed by the Reason: Application Missing Signature. Lastly hit "Save".



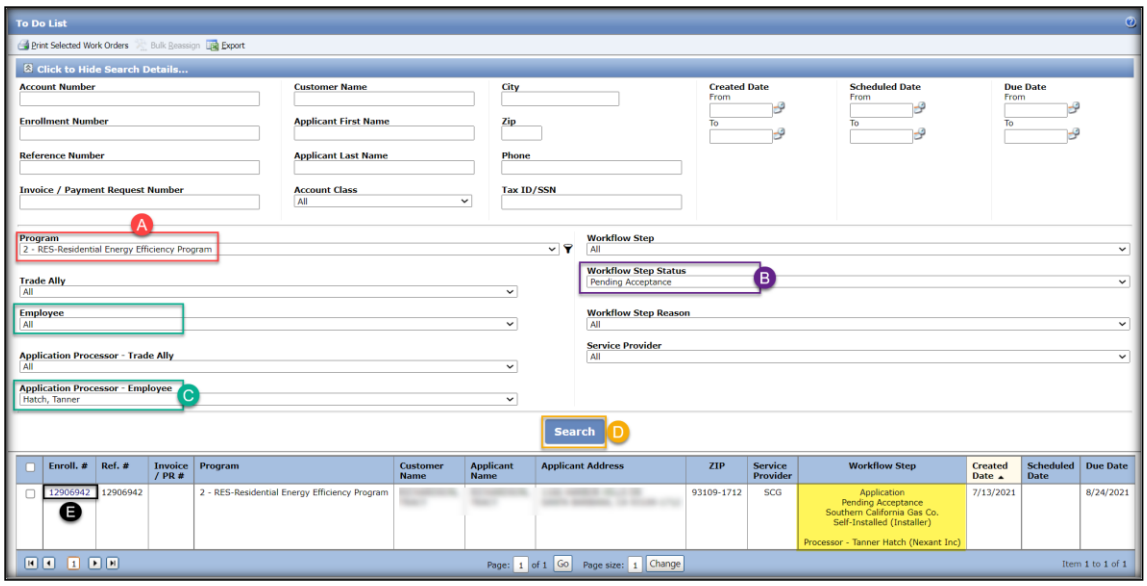
COMPLETING ON HOLD – APPLICATION MISSING SIGNATURE

To complete an application that has been placed On Hold – Application Missing Signature. The customer will either send in their documents or sign electronically through the consolidated check status link.

When a customer mails in their signature form, RICOH will scan it in and add it to the original enrollment or notify the Processing Team Lead they were unable to add the document. The Processing Team Lead will assign these to a processor to complete.

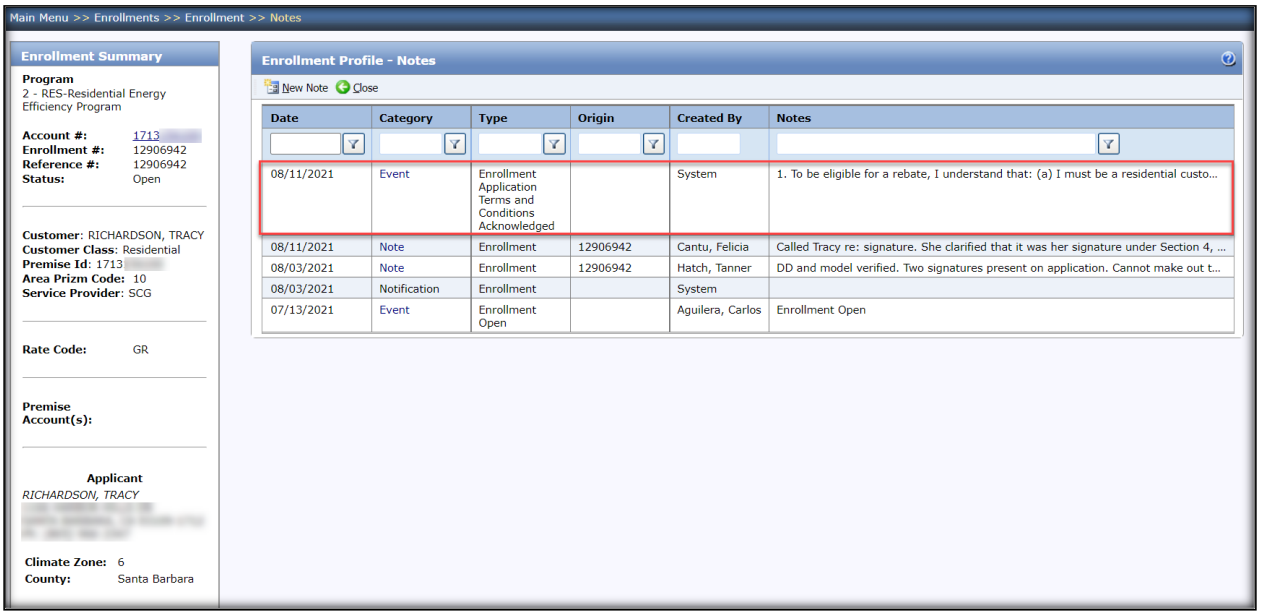
If the customer chooses to sign electronically the mail in applications, the status will change and they will come in as "Open – Pending Acceptance".

You will search for your resubmittals for Application Missing Signature by doing the following:



A. Program = 2 – RES-Residential Energy Efficiency Program
B. Workflow Step Status = Pending Acceptance
C. Employee or Application Processor – Employee = Your name in one of the boxes and leave other to “All”
D. Click on Search
E. Click on Enrollment # Hyperlink to open the enrollment.

Once you are in the Enrollment you will navigate to the Notes section to see if the customer has accepted electronically. The note to look for is the “Enrollment Applications Terms and Conditions Acknowledged”. If you see this, this means the customer has electronically signed. You can continue with processing the application normally.



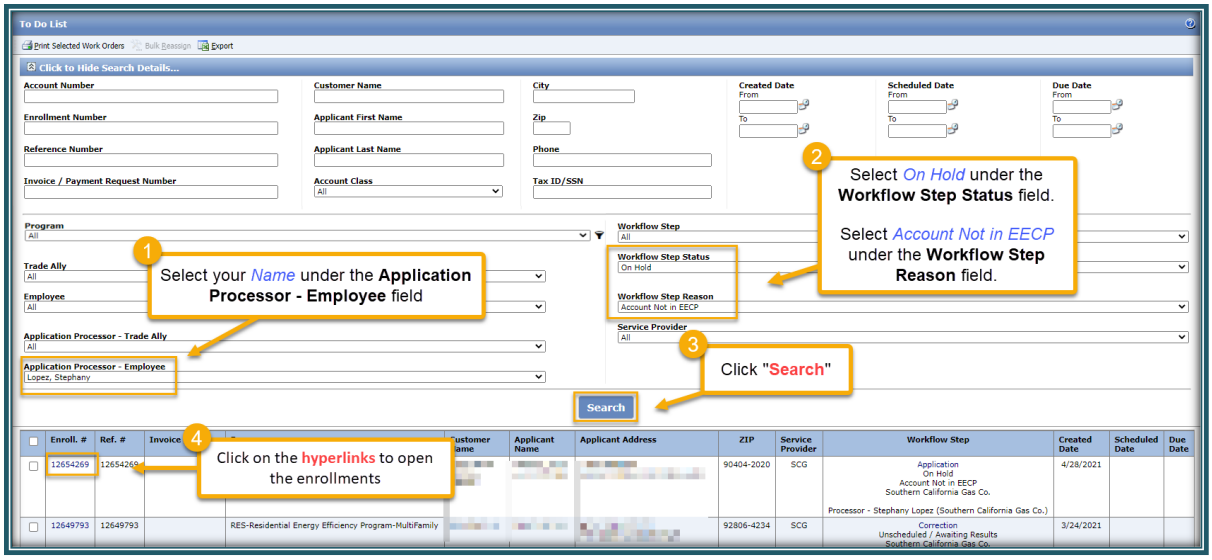
On Hold - Account Not In EECP

Applications with the status of **On Hold – Account Not in EECP** are enrollments where the applicant's account has been found in **CIS**, but the account cannot be found within **EECP**'s directory.

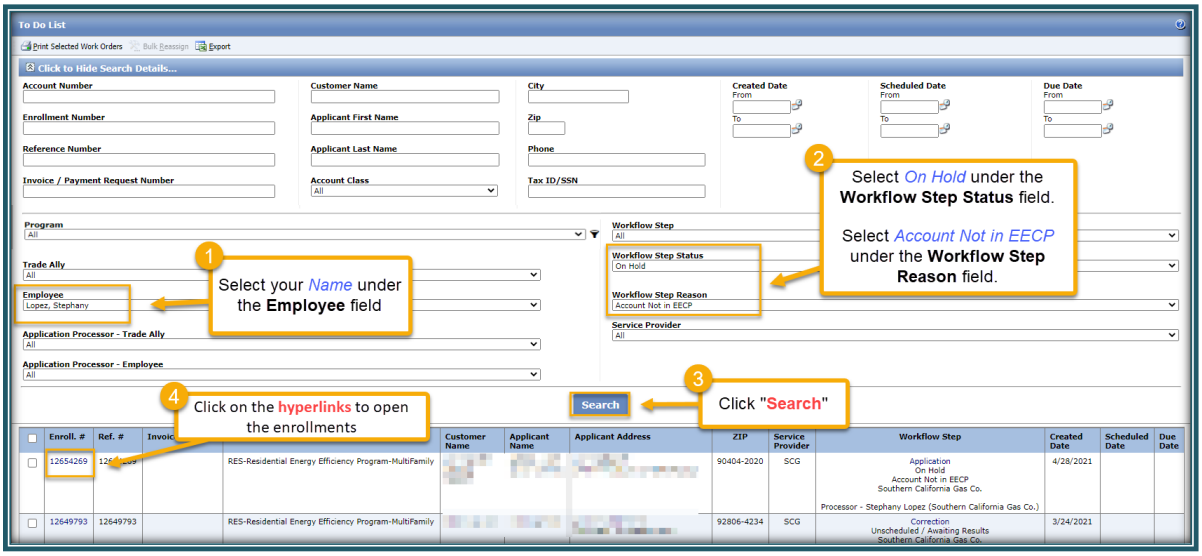
Accessing On Hold Accounts Not In EECP

To access **On Hold – Accounts Not in EECP**, the processor will follow the steps below:

Method 1:

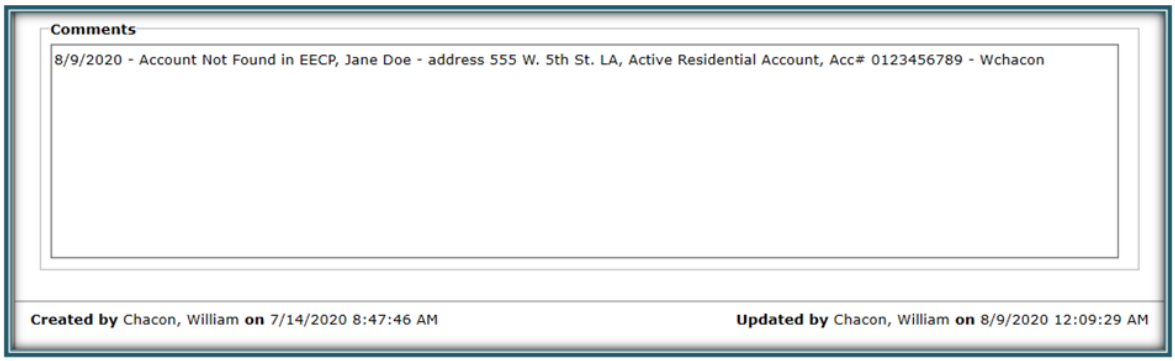


Method 2:

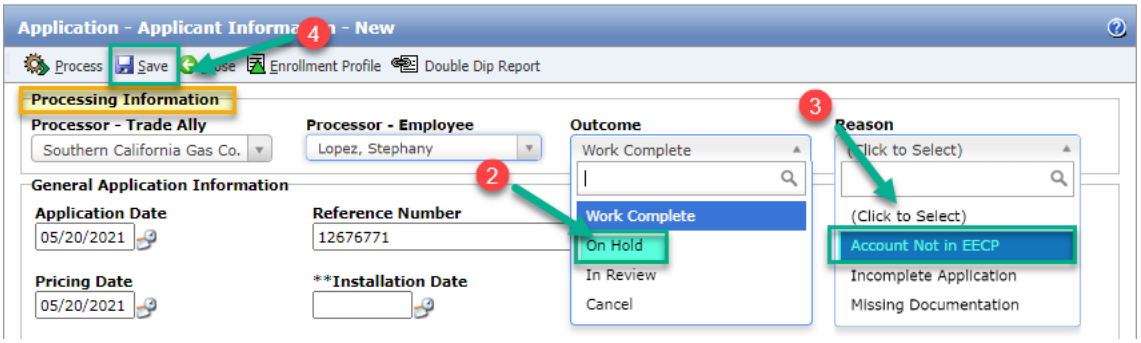


PLACING AN ENROLLMENT ON HOLD – ACCOUNT NOT IN EECP

To place the application on this status the processor's **1st step** is to ALWAYS add a comment inside the application workflow with the information found in CIS [**Active Accounts Only**] The note will include the following: Account Holder Name, Account Holder Address, Status of Account, and Account #, reference the image below.



Next set the status to On Hold followed by the Reason: Account Not in EECP. Lastly hit "Save".

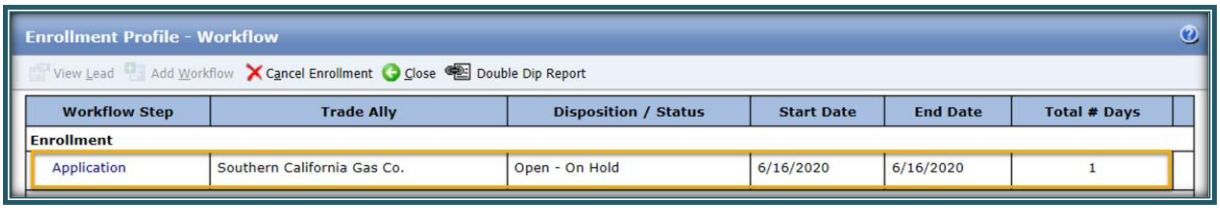


If placed on hold correctly, the account will be added to **EECP** on Monday after 12:30 PM and can be attached to the enrollment thereafter. For that reason, enrollments left on **On Hold – Account Not in EECP** will be completed every Monday after 12:30 PM.

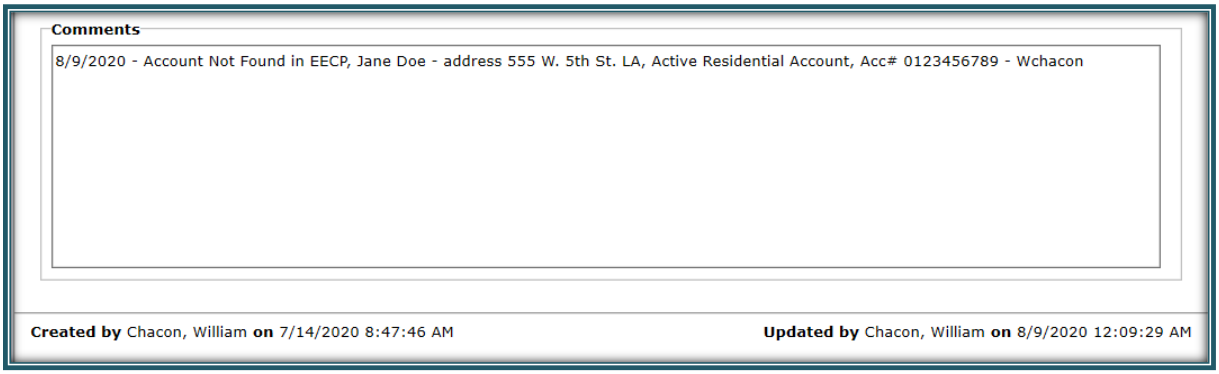
**For Inactive Accounts in CIS, please refer to Inactive Account Scenario Procedure & Guideline in Appendix.

COMPLETING ACCOUNTS NOT IN EECP

1. Open the **Application** workflow:



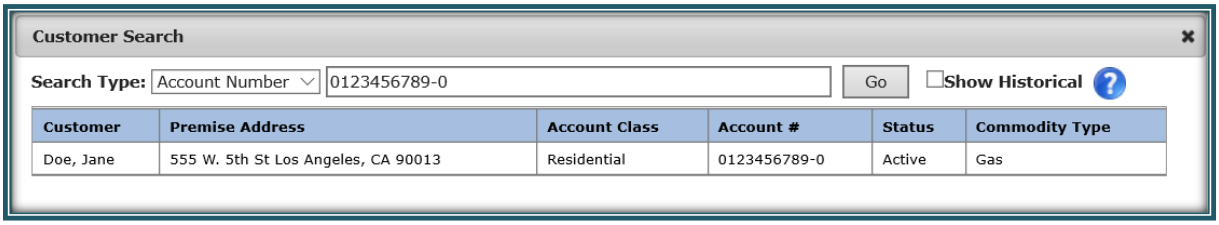
2. Scroll down to the **Comments** section of the **Application** workflow and copy the **Account Number** left by the previous processor.



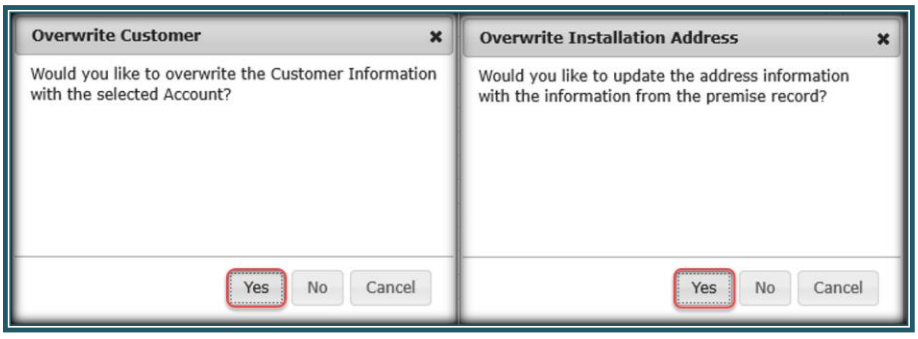
3. Click "Search" under the **Customer** section. Change the **Search type** to **Account Number** and enter the account number in the field. (Note: an additional 0 may need to be added at the end to complete the 11-digit account number):



4. If the Account Number matching the applicant's address is found in EECP double click the address:



5. Click YES to both Overwrite warnings with the selected Account:

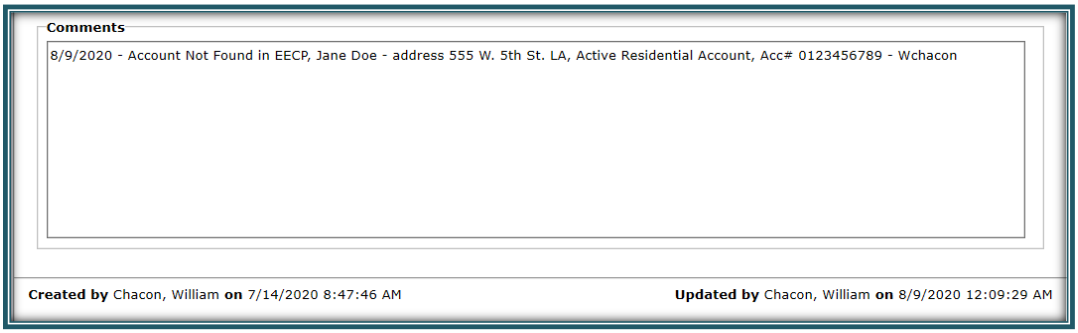


6. The Account and Account holder's information will now be present under the **Customer Information** section of the Application workflow. Proceed to complete the application using the standard processing guidelines and procedures.

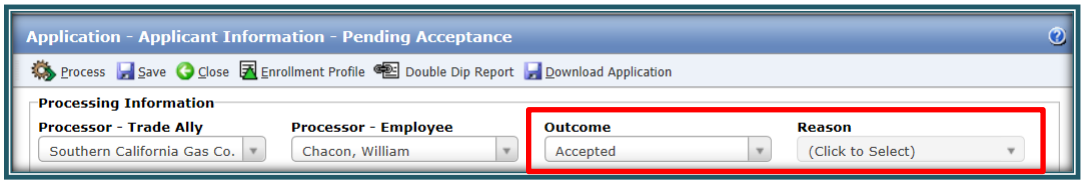
ADDING ACCOUNT NUMBERS:

If a note detailing the accounts **Active/Inactive status**, **account number,** and **Rate Code** is **NOT** found under the **Comments** section, the application workflow will need to be saved on **Work Completed.** A note will then need to be added and finally saved again on **On Hold – Account Not in EECP** to trigger the **Account Not in EECP/Account Class/Meter Flag Update** email. If this is the case, do the following:

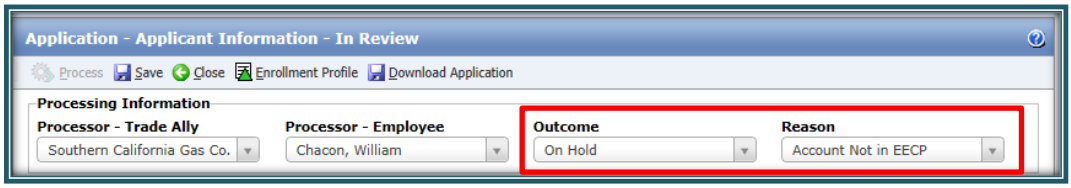
1. Locate the applicant's account number in **CIS** (verify that the account cannot be found in **EECP**)
2. Enter a comment in the **Application** workflow's **Comments** section indicating the account cannot be found in **EECP**, the **ACTIVE/INACTIVE** status of the **Account**, the **account number**, **account holder's name**, and **premise's address**:



3. Save the enrollment as **Accepted** or **Work Completed:**

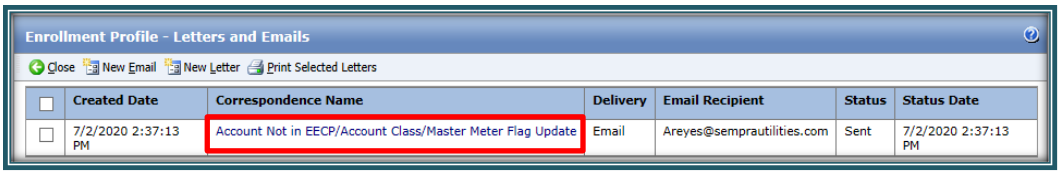


4. Save the enrollment as **On Hold – Account Not in EECP:**



****Following these two steps is critical as it triggers the following email to be sent. Not doing this step will cause the enrollment to be skipped in the batch process that adds accounts to EECP and may cause delays in processing time.**

5. Verify an **Account Not in EECP/Account Class/Meter Flag Update** was sent. If the email was not sent, verify the required note was made in the **Application Comments** section, and the account is saved on the **On Hold - Account Not in EECP** status. An **Account Not in EECP/Account Class/Meter Flag Update** may manually be sent from the **Letters and Emails** workflow if one was not automatically generated.



Note: It is important to make the Note in the Comments Section of the Application Workflow and Save it in the On Hold – Account Not in EECP status. Doing so will forwards the written information so the account can be added to EECP. Accounts are added to EECP every Monday at 12:30 P.M.

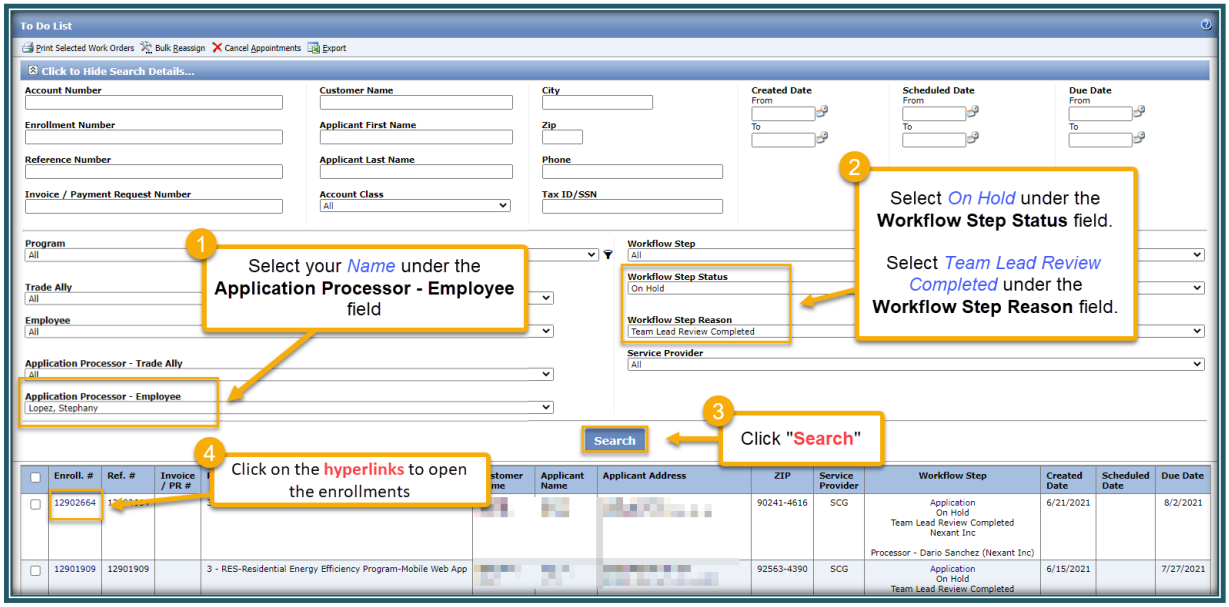
TEAM LEAD REVIEW COMPLETED

Applications with the status of **Team Lead Review Completed** are enrollments the Processing Team Lead has reviewed due to processors requesting Team Lead Approval or clarification on an enrollment.

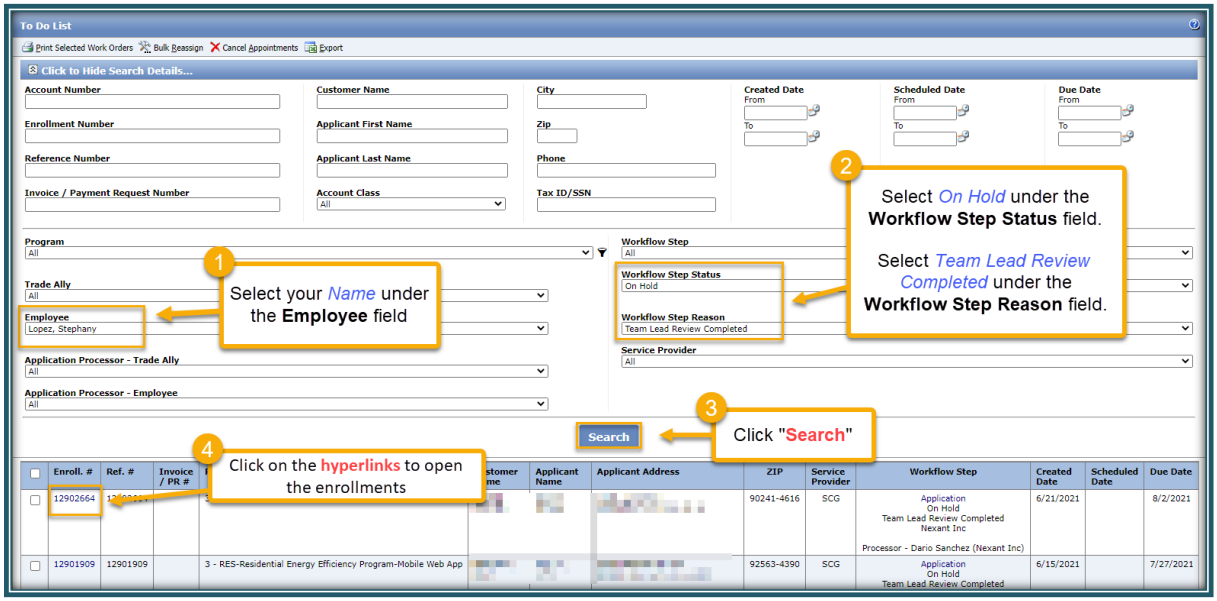
ACCESSING TEAM LEAD REVIEW COMPLETED

To access **On Hold – Team Lead Review completed**, the processor will follow the steps below:

Method 1:



Method 2:



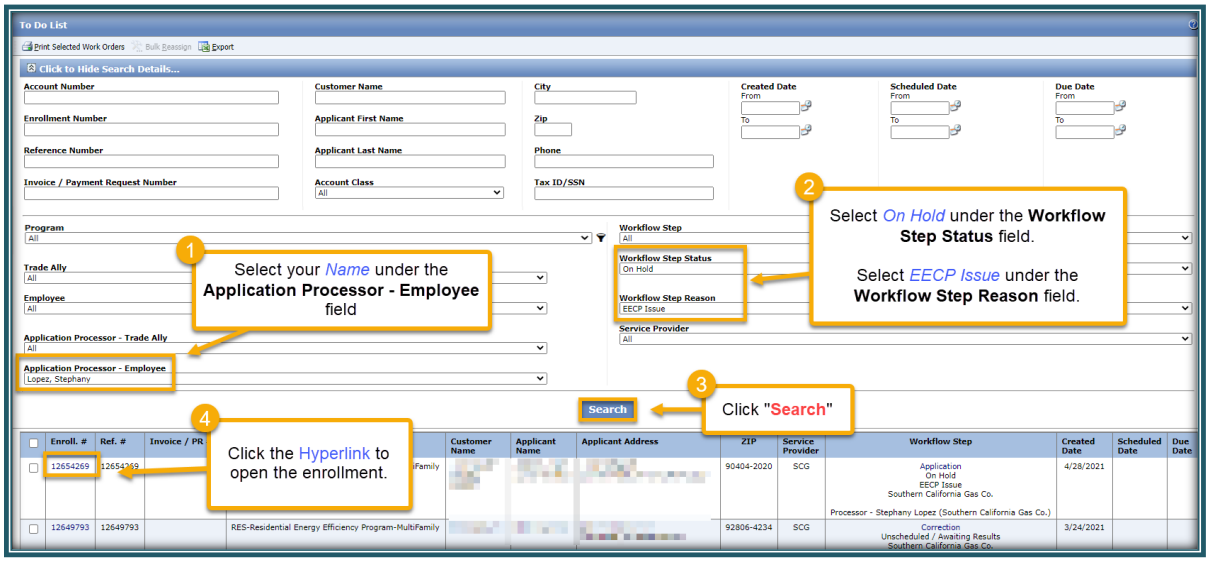
EECP Issues

Applications with the status of **EECP Issue** are applications which had a technical issue preventing the application from being processed. This is not limited issues explicitly preventing the processor from completing a workflow step, or issues with incentives/therms/etc not displaying properly. If many **EECP Issues** are filed, often the **Processing Team Lead** will issue procedures on how to process enrollments with common issues.

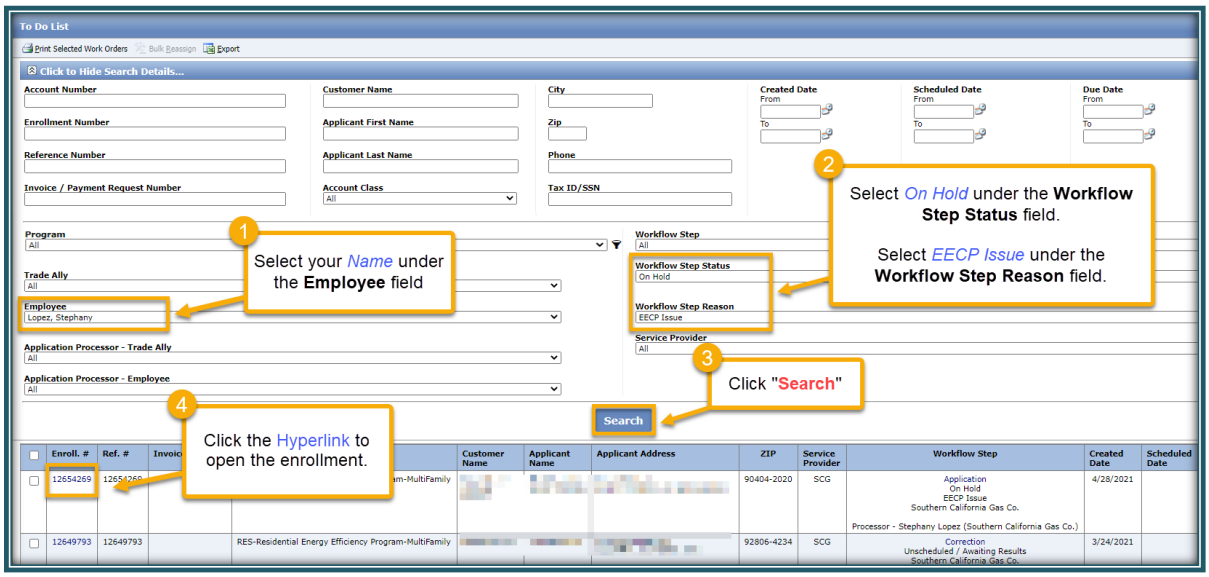
Accessing EECP Issue

To access **On Hold – EECP Issue**, the processor will follow the steps below:

Method 1:



Method 2:



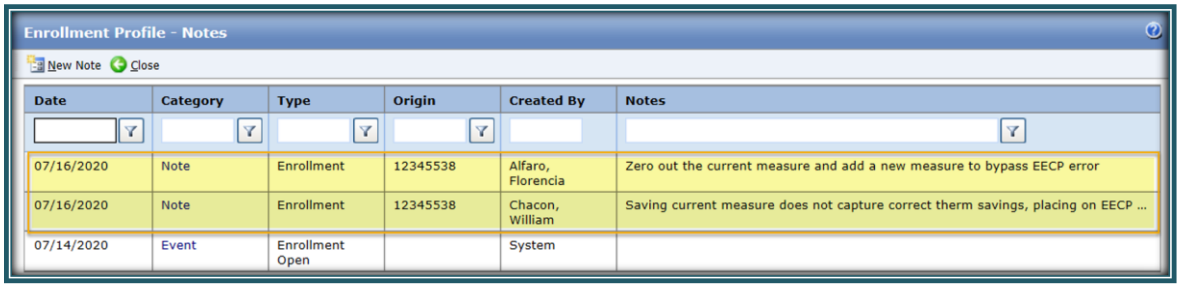
COMPLETING EECP ISSUES

As stated earlier, enrollments left **On Hold – EECP Issue** often will have procedures published by the **Processing Team Lead** on how to complete them. Otherwise, processors will make the effort to check the **Notes** workflow to see if any instructions have been issued for a specific enrollment.

1. Open the **Notes** workflow:



2. Identify why the enrollment was left **On Hold – EECP Issue** and what action is needed to complete the enrollment:



3. Proceed to finish the enrollment based on the notes made by the **Processing Team Lead**. If the application can be completed, ensure the **Application** workflow and any open **QA Correction** workflows are **Closed – Work Completed** Be sure to update any relevant fields.

EECP Issue Template

The following template is to be used when filing an EECP Issue with the EECP Help Team. The template is extremely helpful to the EECP Team as it captures all the elements needed to diagnose, resolve or elevate reported issues.

EECP Application - Technical Issue	
Issue Reported By	
Issue Experienced By (Processor Name/Customer Name)	
Customer Account Number (if available)	
Customer Enrollment Number	
Customer Call Back Number (If applicable)	
Customer Email Address (If applicable)	
Would Customer be ok with EECP Team contacting for further testing/questions? (yes/no) If yes, preferred contact method? (Phone/Email)	
Browser user was using (IE, Chrome, etc.)	
Step in which issue occurred? (Step 1, 2, 3, 4, 5, 6, 7, 8, 9, or confirmation email?)	
Is this a – **· Internet Timeout?** **· EECP Error?** **· System Issue?** **· Confirmation Email Issue? Not received? Not displaying properly? Please attach file to ticket.** **Provide steps that led to the issue user is experiencing. Please attach screenshots (if possible).**	

Check Reissuance

BACKGROUND

Payment Processor and EIC Processor will have designated tasks in the re-issuance of a check within Support Services. Re-issuance of a check may fall under the following circumstances:

- EIC Customer Call/email
- Letters from Accounts Payable

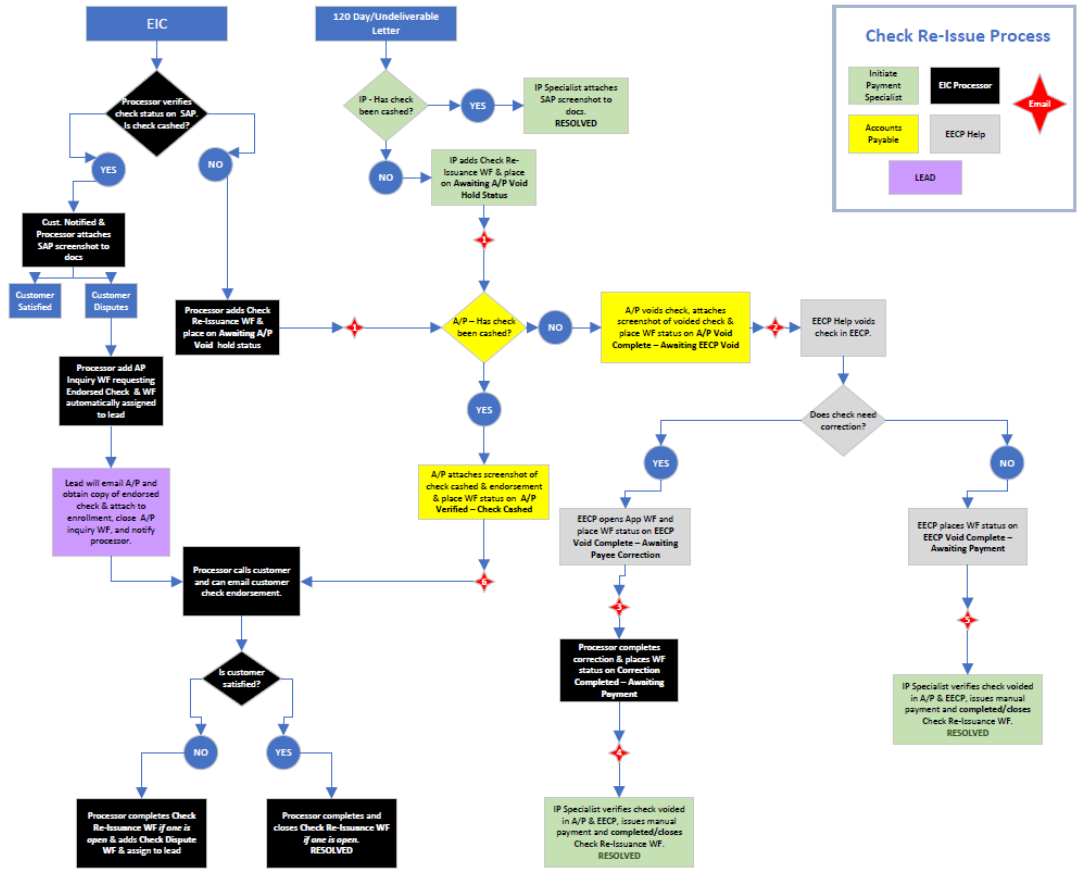
Payment specialist may receive letters from Accounts Payable informing specialist of undelivered check or checks that are 120 days old that have not been cashed. Payment processor reviews account and takes necessary steps to review or reach out to the customer and re-issue check if needed.

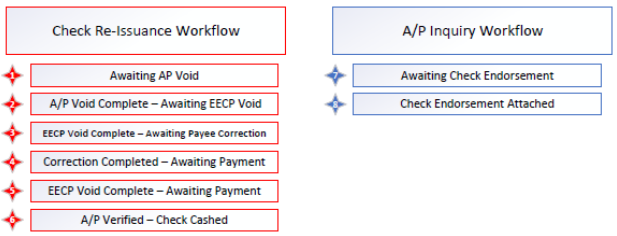
EIC Processor can also receive check re-issue request via Energy Information Center (EIC) or email when customers inquire about their checks or receive letters from Accounts Payable informing payment processor of undelivered check or checks that are 120 days old that have not been cashed.

EIC processor reviews account and will take necessary steps to review or proceed to start check re-issue process.

Any checks that remain uncashed after a 3-year lapse time go into escheatment. The Sempra Bank Rec & Escheatment department sends a report of all checks assigned to Quality Assurance Department to confirm which checks need to be escheated.

PROCESS FLOW





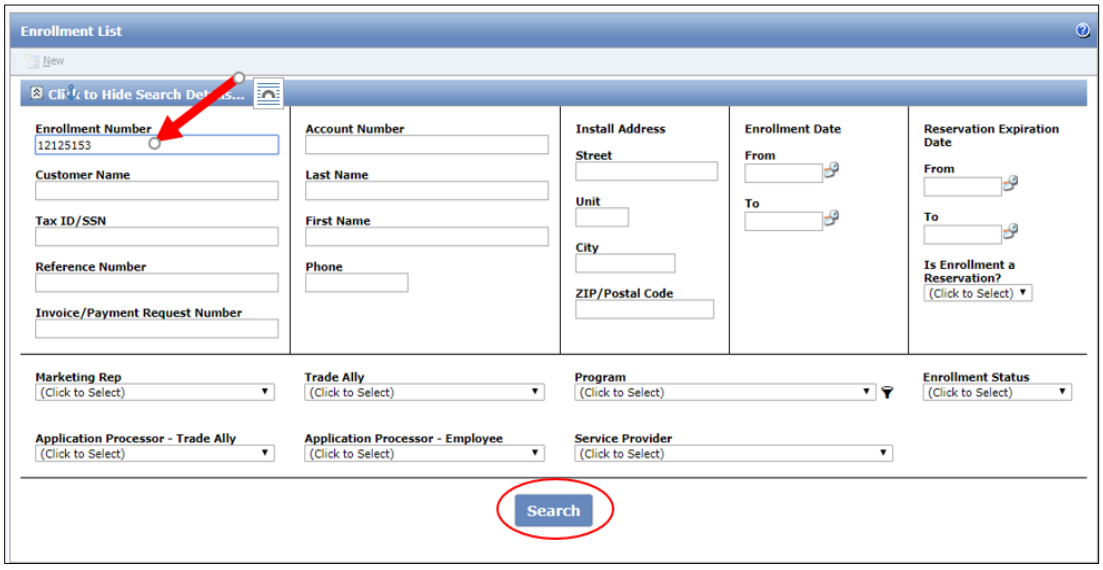
EIC REP - VERIFYING IF CHECK HAS BEEN CASHED

EIC processor receives a call or email from the customer requesting a check re-issue. EIC processor will verify and complete a thorough analysis of the account to determine if check needs to be re-issued. Analysis will include reviewing information in EECP and SAP.

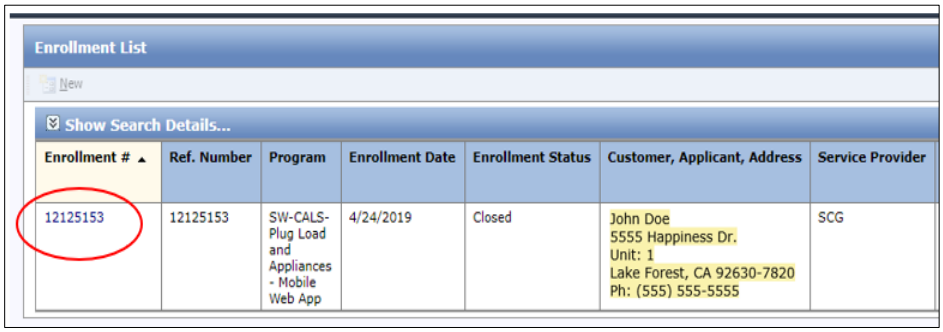
1. EIC processor verifies if check was issued in EECP. Login into EECP and select **Main Menu** and then select **Enrollments**.



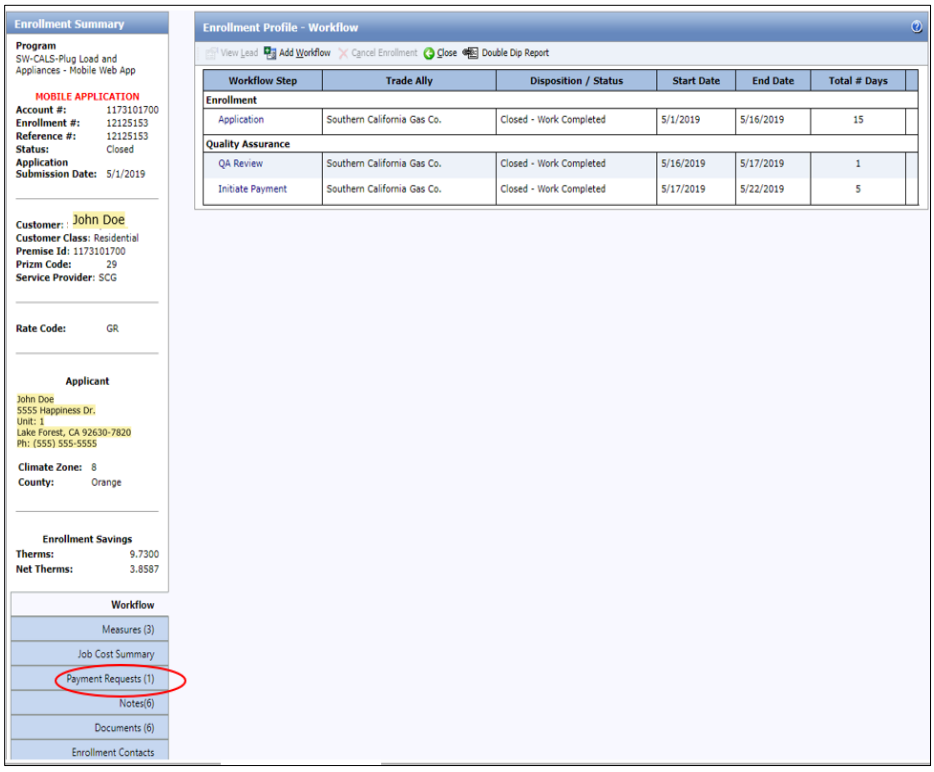
2. Enter **Enrollment Number** provided by customer and select **Search**.



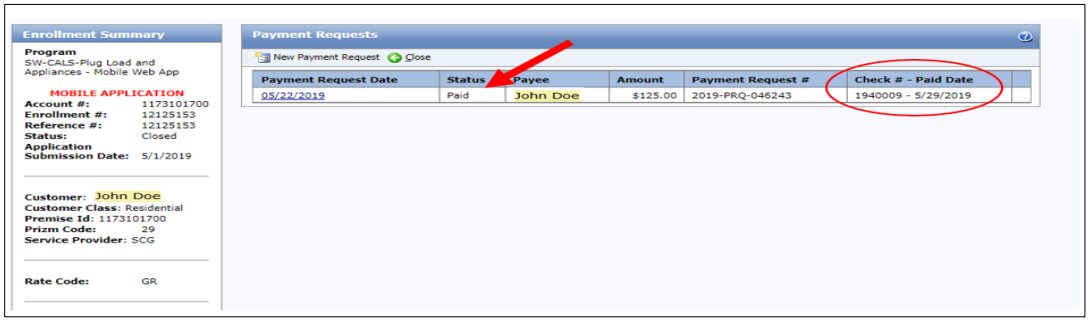
3. Select **Enrollment Hyperlink**.



4. Scroll down to page and select **Payment Request**.



5. Review **Status** of check and **Check Number**.

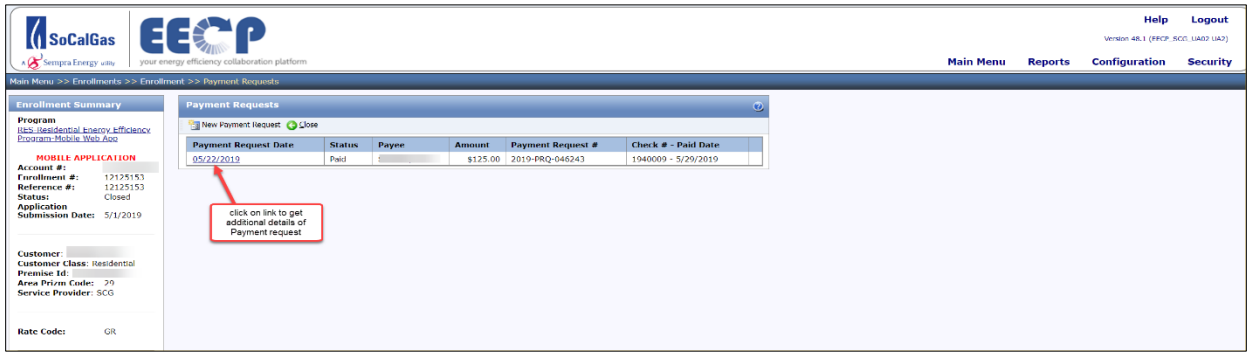


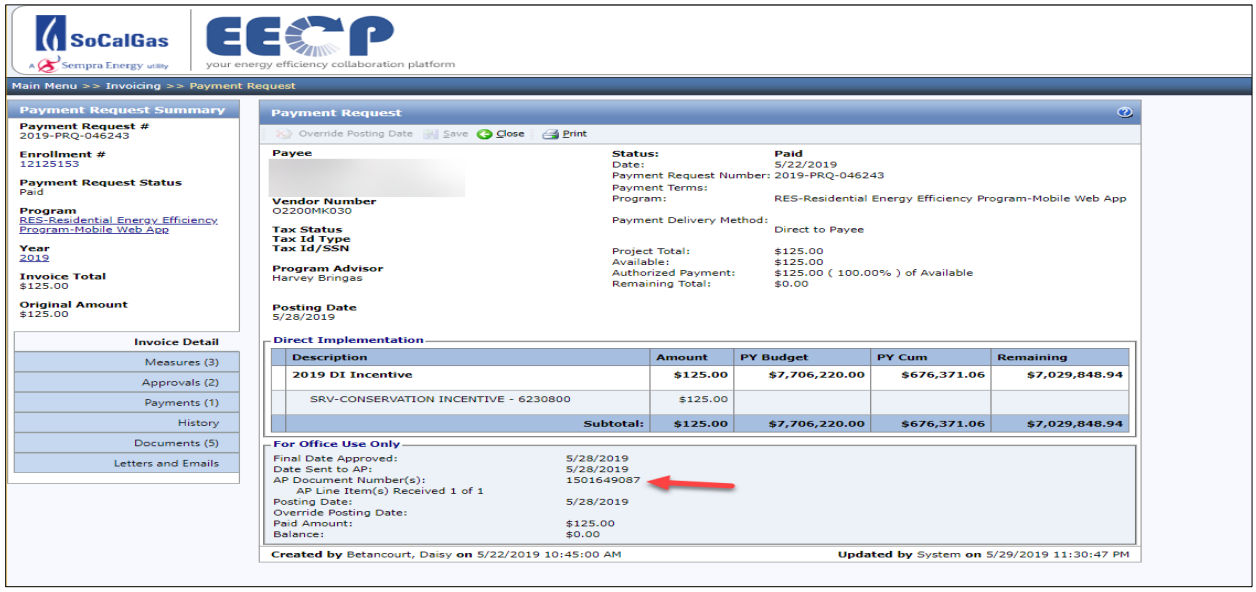
	Meaning
Paid	Check has been generated. Look at Paid Date, expect within 10 business days of paid date.

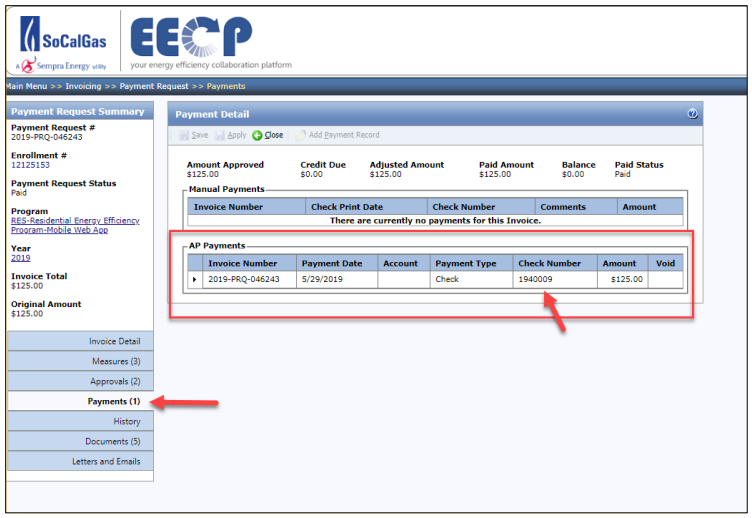
Pending Approval	Check needs to be approved by program advisor and/or program manager (view Approvals subsection of Payment Request)
Pending Ap Transmittal	Check has been approved by manager and is now in the AP department waiting to get issued (payment request has passed all approvals awaiting AP to generate a check)
Cancelled	Check has been cancelled in EECP, check enrollment notes for additional information

You can analyze the payment request by verifying the following:

- When payment request was issued.
- If all approvals have been completed.
- If check number/document number has been assigned to the payment request.

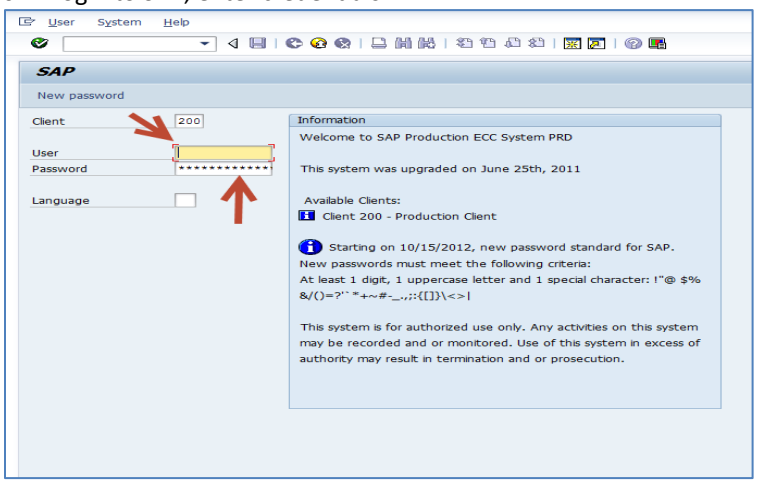




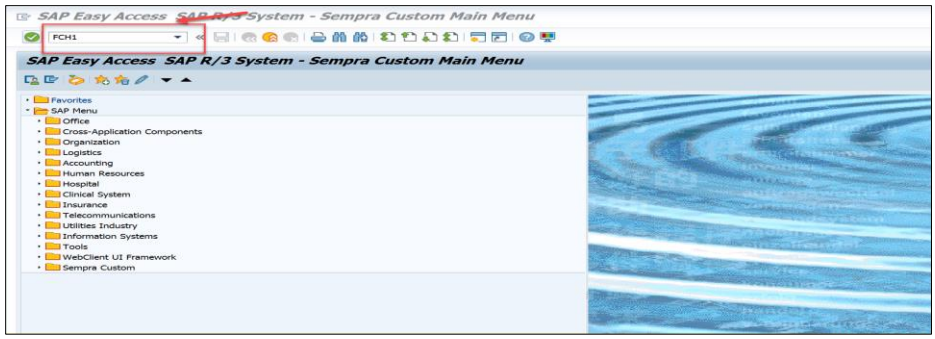




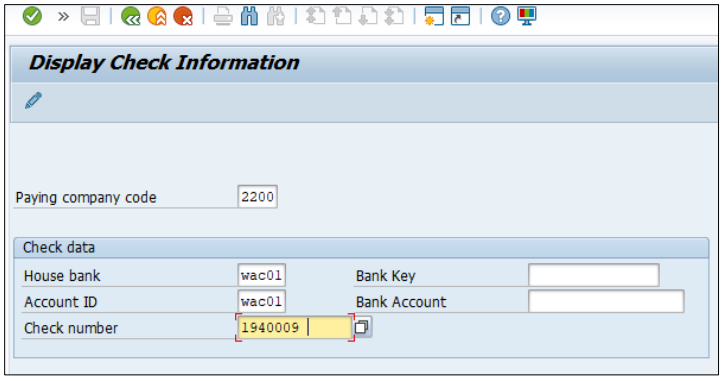
6. Login to SAP, enter credentials.



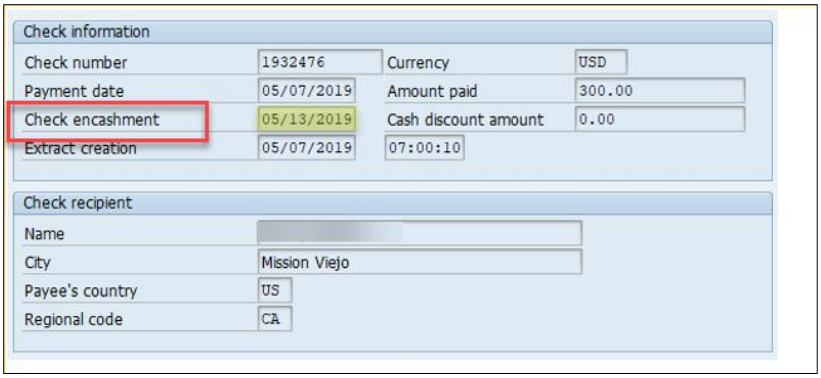
7. Enter **FCH1** and press **ENTER** to view check information.



8. Following information will always be the same:
 - Paying Company Code: **2200**
 - House Bank: **WAC01**
 - Account ID: **WAC01**
 - Check Number: **Retrieve from enrollment.**
 - Hit **ENTER**

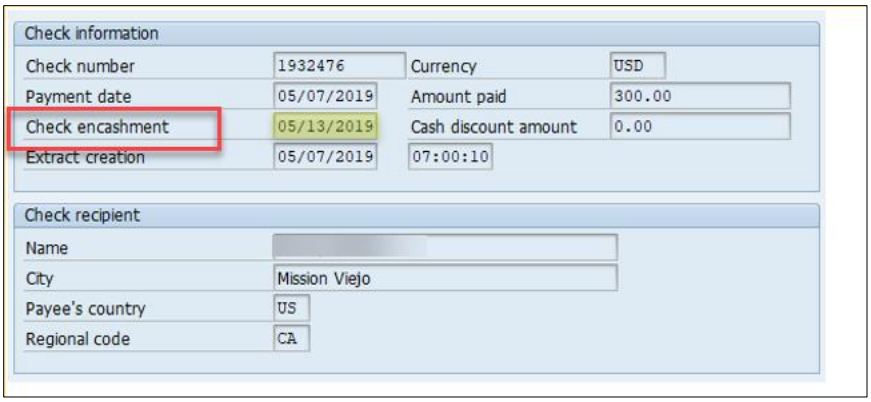


9. Review the "Check encashment" field to determine if the check has been cashed.
 - Date is **NOT** populated - **Check has NOT been cashed**
 - Date is populated - **Check has NOT Been Cashed**

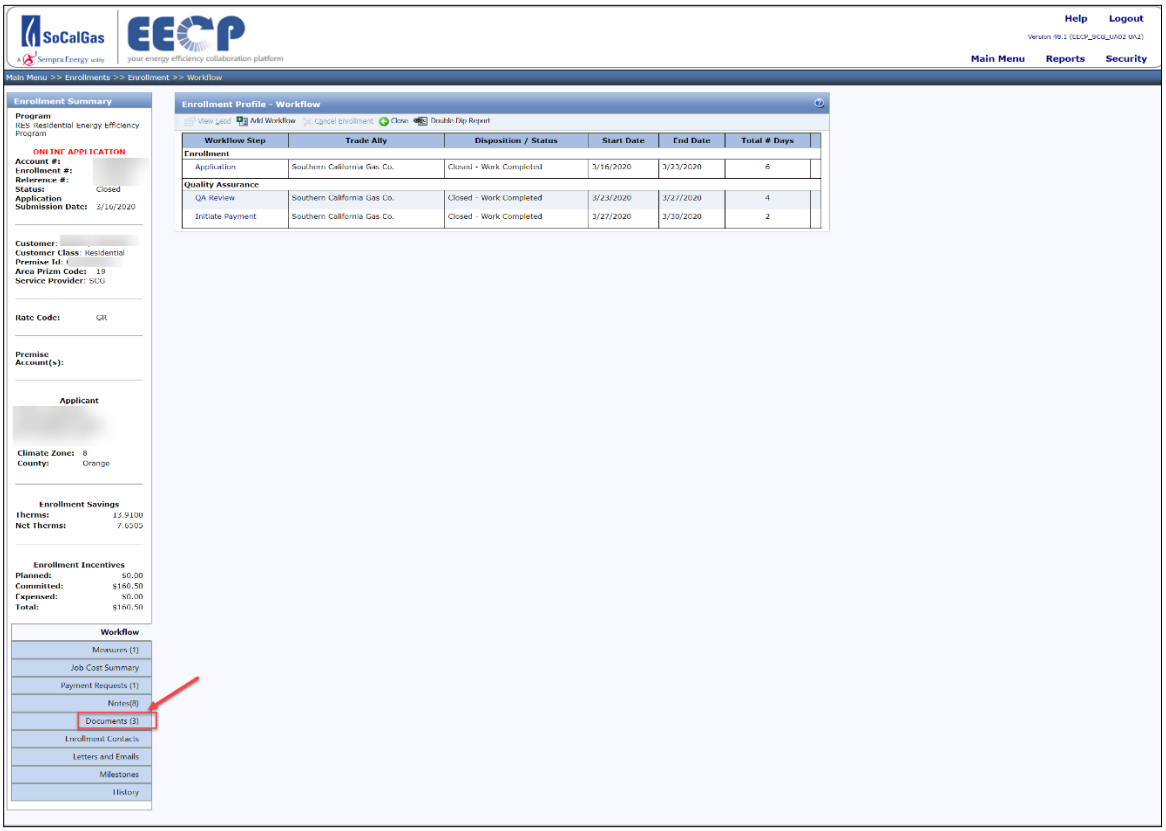


SCENARIO 1: CHECK HAS BEEN CASHED

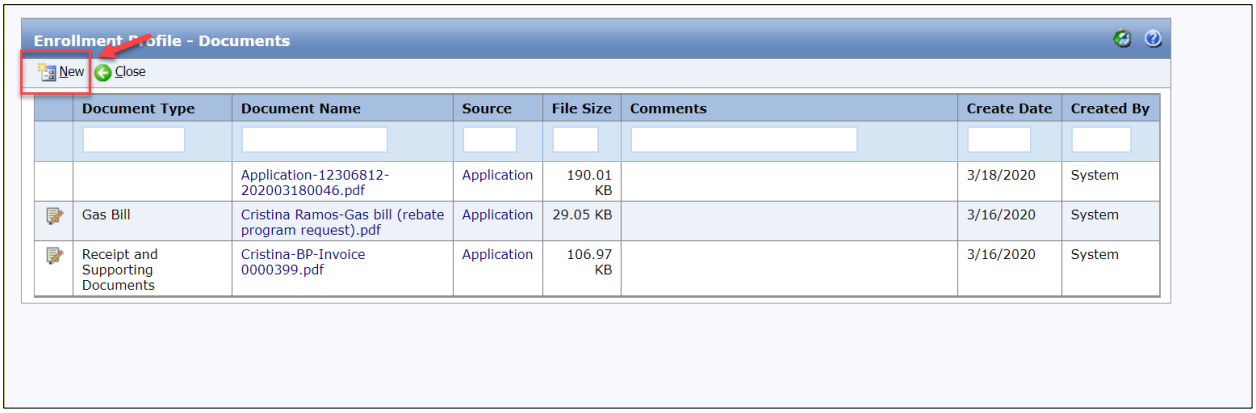
1. If the EIC processor identifies the check **has been cashed**. Inform the customer of date of Check Encashment.



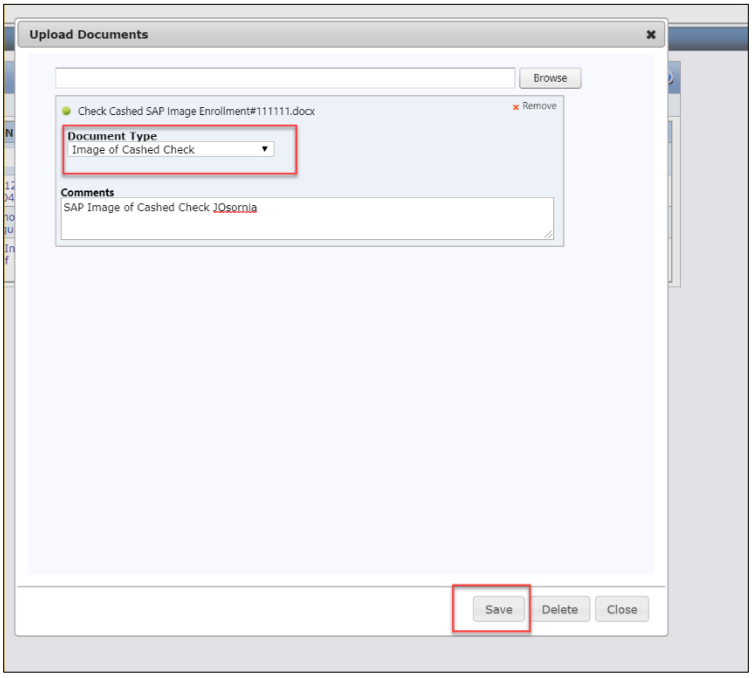
2. Attach a screenshot of the SAP Check information image in the documents section of the enrollment in EECP. Go to the Documents subsection of the enrollment.



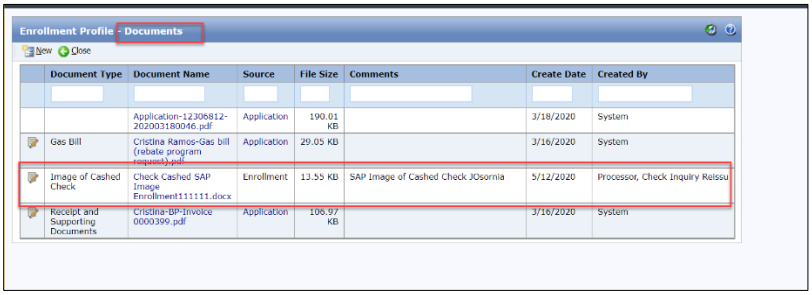
3. Select **New**



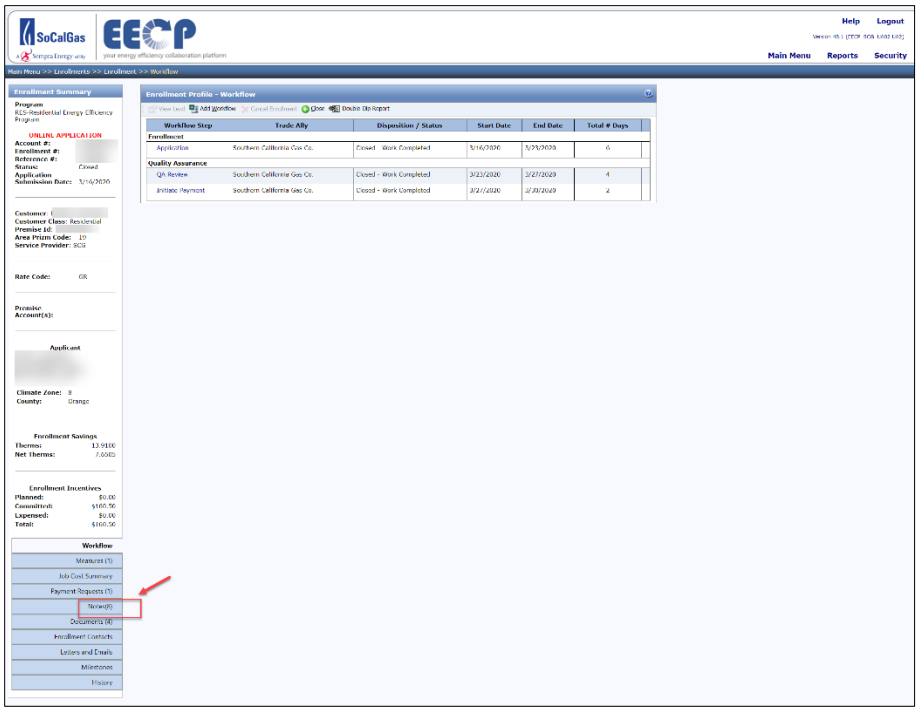
4. A screen to upload the document will pop up and you can upload the SAP Check image and select from Document type dropdown “Image of Cashed Checked” and hit SAVE.



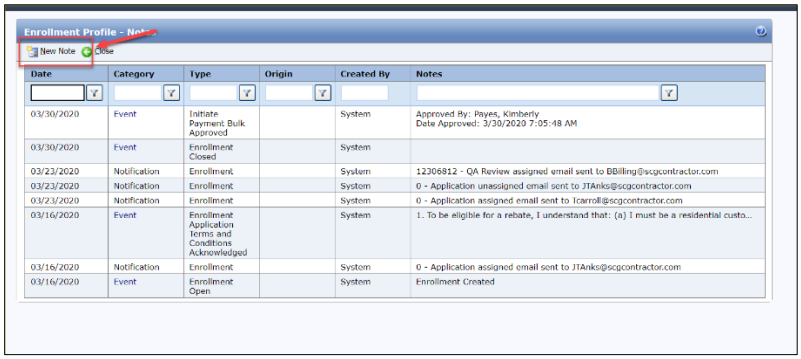
5. You will be able to view your added Document in the Documents subsection of the enrollment.



6. Make a note of the call or email identifying the caller/email sender and the information you provided to the customer. Identify the check number and date it was cashed. (ex: John Smith called to inquire about Check# 11111. Informed customer check was cashed on 1/1/20.). Go to Notes subsection of the enrollment.

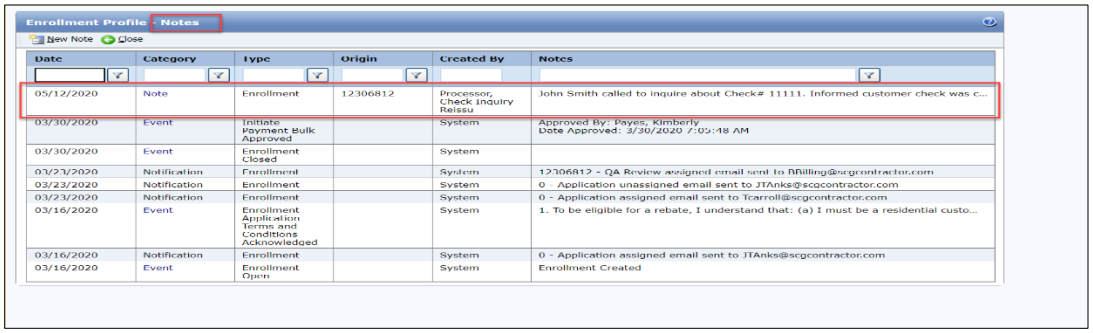


7. Select **New Note**



8. Add your note in the “Notes” section, Note Type is Enrollment and SAVE.

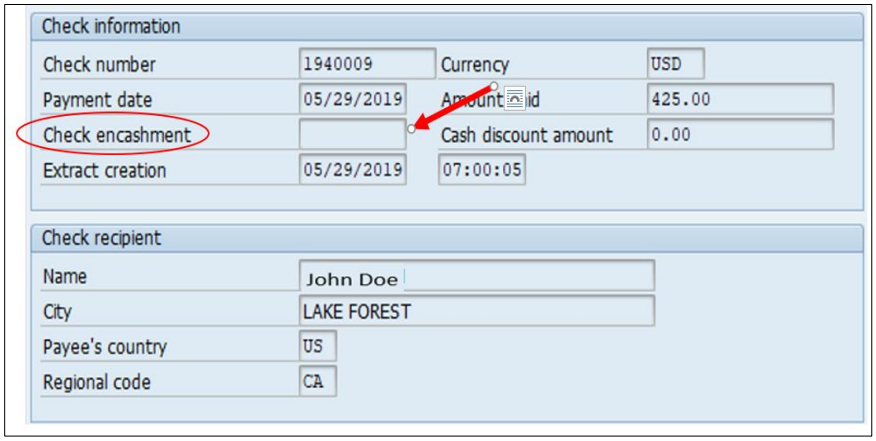
9. You will be able to view your added Note in the Notes subsection of the enrollment.



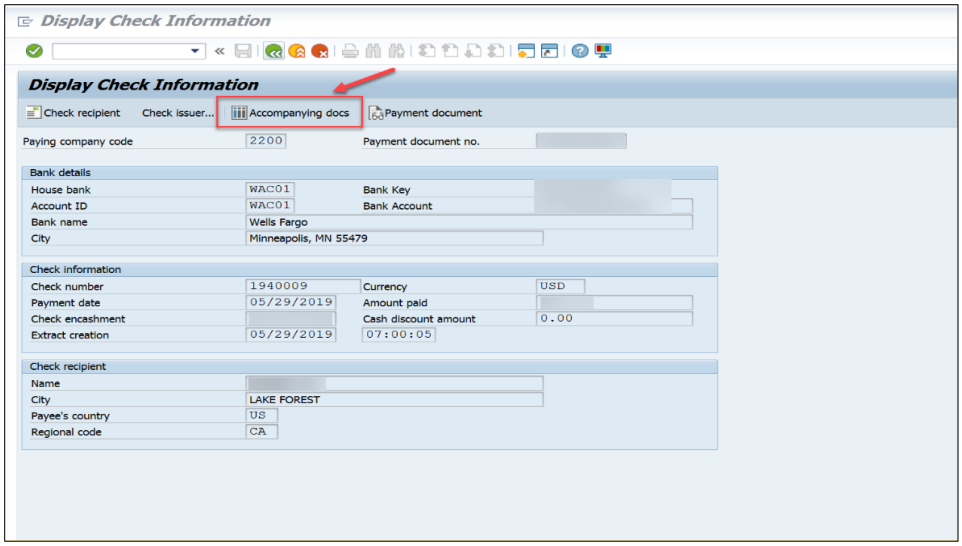
SCENARIO 2: CHECK HAS NOT BEEN CASHED

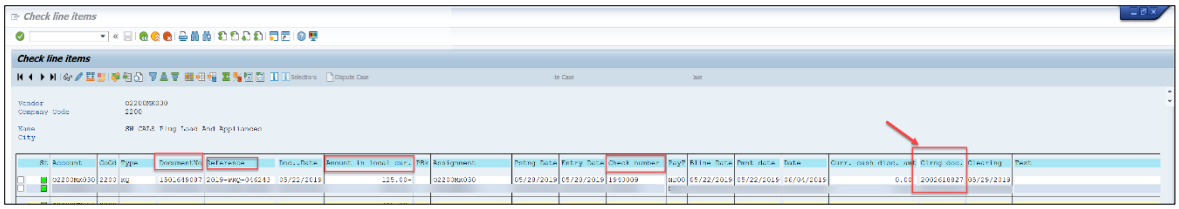
1. Review Check Encashment field. If field appears blank, check has not been cashed. Proceed to re-issue check process. If there is a date in the check encashment field proceed to Miscellaneous Procedures section of this document – Check Cashed.

2. If check is not cashed, obtain Clearing Doc number in SAP.



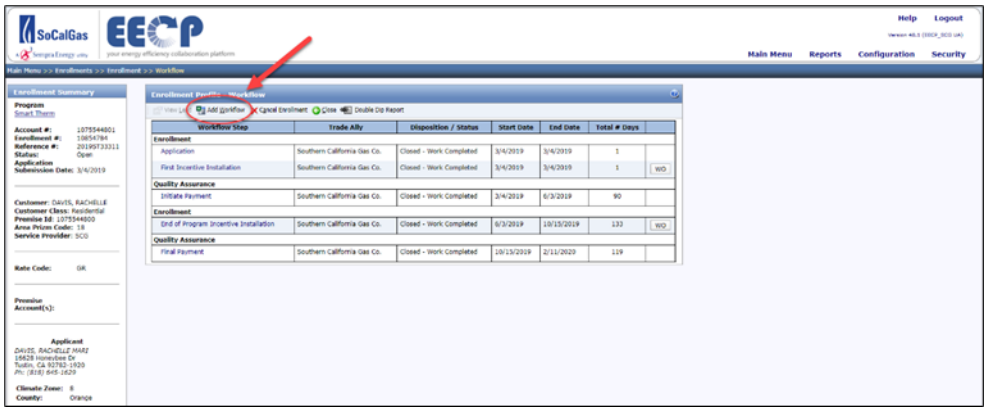
3. Click **Accompanying docs** icon and scroll to the right and you will find the Clearing Doc number in SAP along with all the check details (same document number as reflected in EECP, Reference number which is the same Payment Request number in EECP, Amount of check and check number).



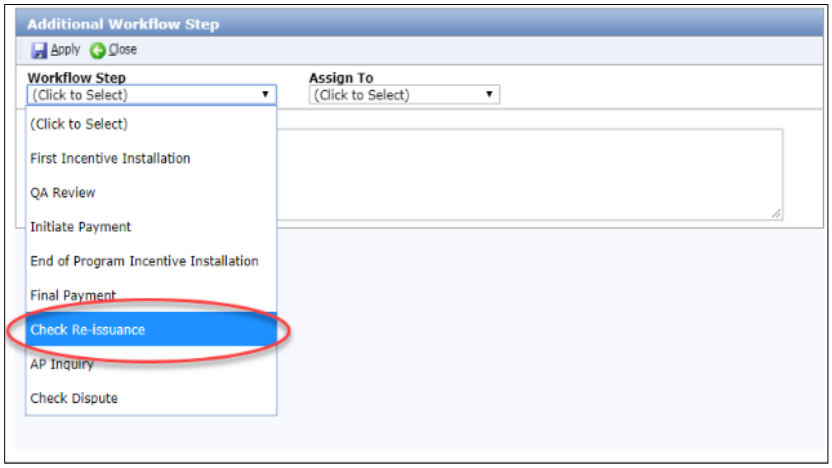


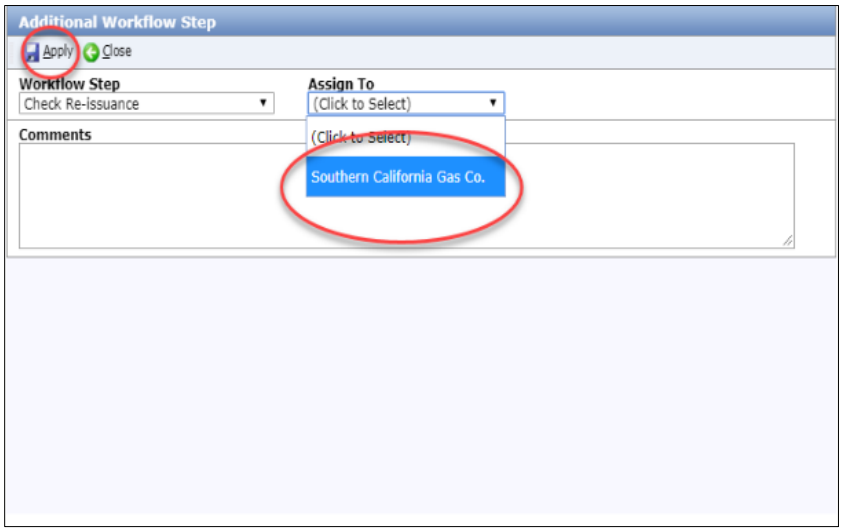
4. To Add Check Re-Issuance Workflow in EECP select **Enrollment**.

5. Select **Add Workflow**.

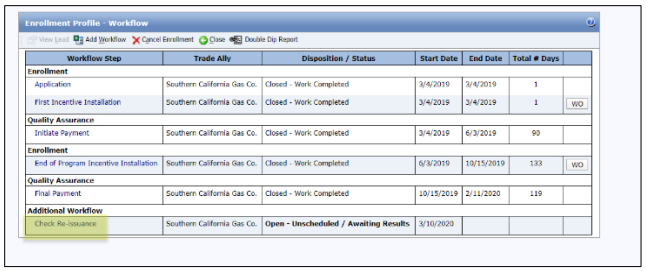


6. Select **Check Re-Issuance** from "Workflow Step" dropdown menu and select **Southern California Gas Co**. from "Assign To" dropdown and select **Apply**.





7. Click on the **Check Re-Issuance Workflow** and complete pertaining fields.



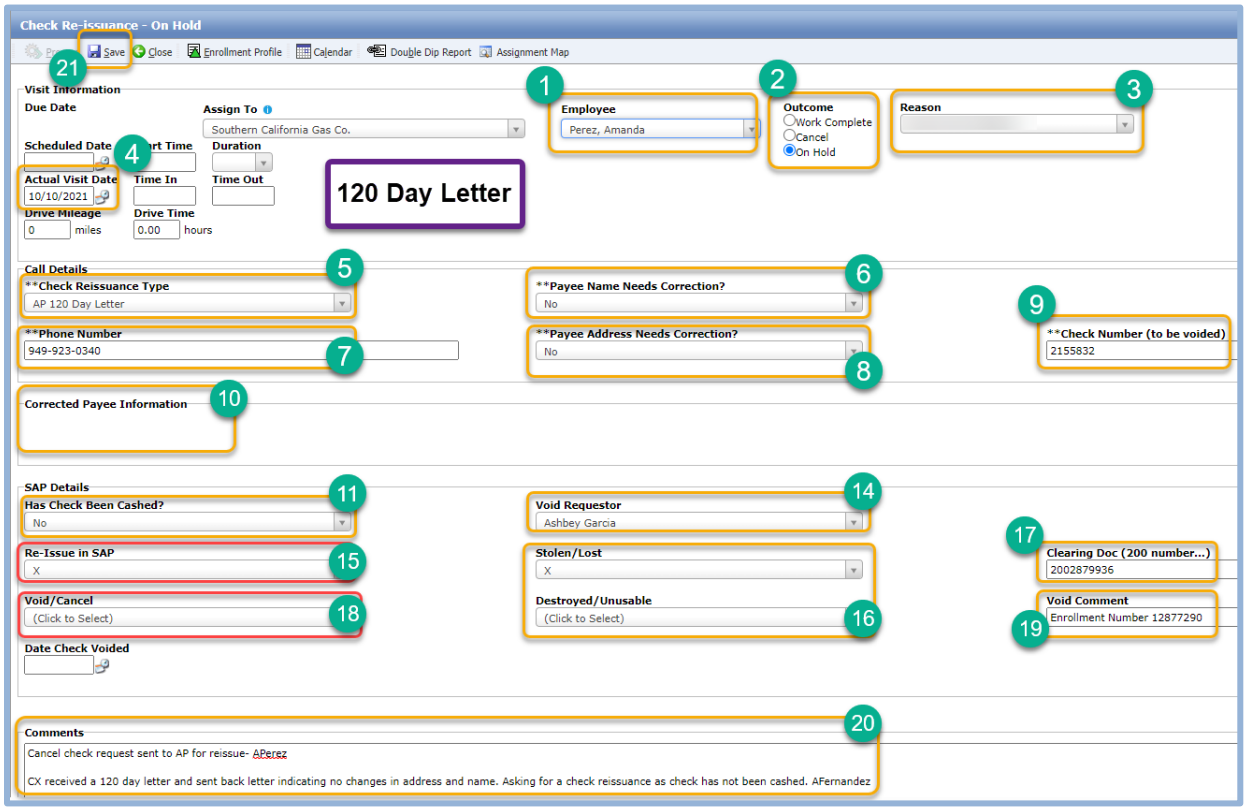
8. Check Reissuance Type: **120 Day Letter:**
 1) **Employee:** Select your name from the dropdown list
 2) **Outcome**: **"On Hold"**
 3) **Reason: Awaiting AP Void**
 4) **Actual Visit Date**: Today's Date
 5) **Check Re-Issuance Type**: 120 Day Letter
 6) **Payee Name Needs Correction**: Yes or No. If **YES** selected, another field will appear in the "**Corrected Payee Information**" section. Enter the correct payee name.
 7) **Phone Number**: Best contact number of the caller
 8) **Payee Address Needs Correction:** Yes or No, Verify in EECP and with Customer - If **YES** selected, another field will appear in the "**Corrected Payee Information**" section. Enter the correct mailing/payee address.
 9) **Check Number (to be voided):** Enter check number.
 10) **Corrected Payee Information:** Enter the correct payee name and/or mailing address based on your selection from Steps 6 and 8.
 11) **Has Check Been Cashed?** Check SAP to verify.

 11a.- If **NO, continue with the steps below (Image 11a)**

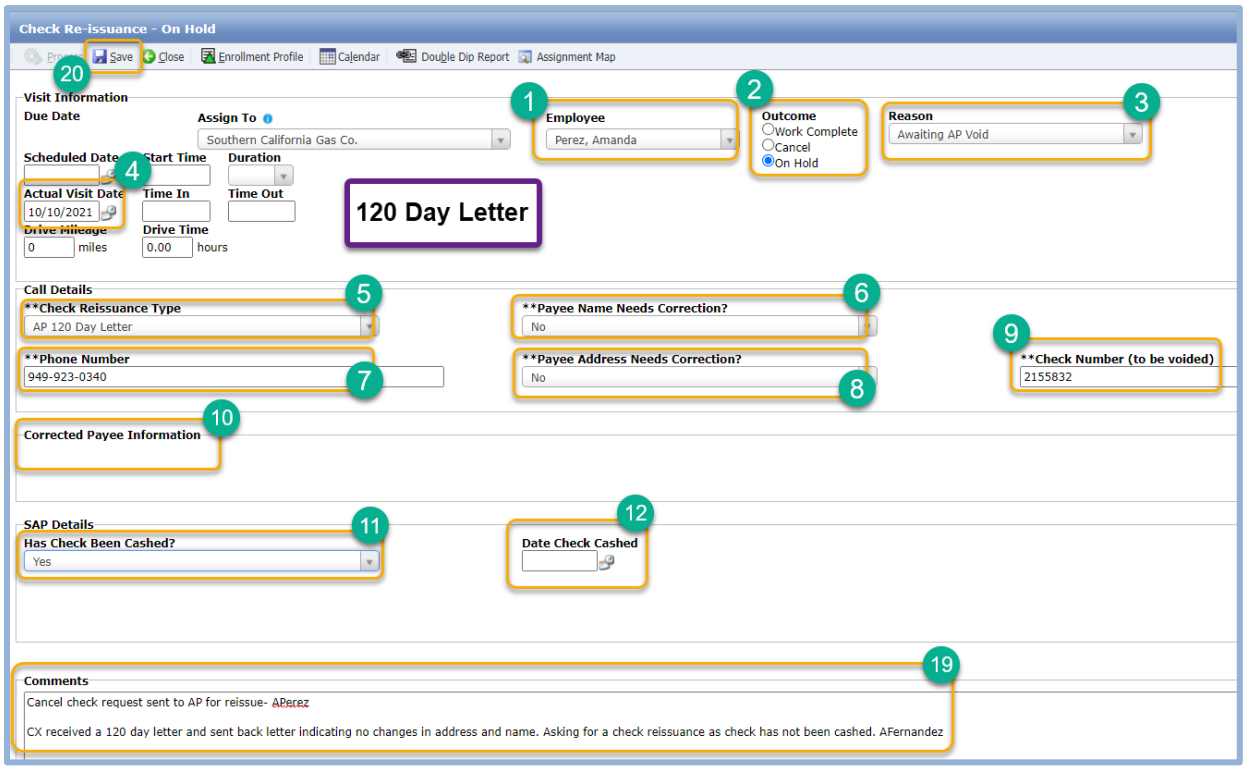
 11b.- If **YES, complete Steps 12, 19 and 20 (Image 11b)**

 12) **Date Check Cashed:** This field will only generate when **YES** is selected in Step 11.
 13) **Void Requestor:** Select your name from the dropdown list
 14) **Re-Issue in SAP: Only select "X" if there are NO changes needed to the payee name AND mailing/payee address.**
 15) **Stolen/Lost or Destroyed/Unusable:** Select the reason provided by the customer
 16) **Clearing Doc (200 number…):** Information obtained from SAP
 17) **Void/Cancel: Only select "X" if there are changes needed to the payee name and/or mailing address. If this option is selected, Step 13 will be left empty.**
 18) **Void Comment:** Enter enrollment number
 19) **Comments:** Add any pertinent information needed for the check reissue.
 20) Click **SAVE** (must be done last)

11a.


Check Re-issuance - On Hold
Save
Close
Enrollment Profile
Calendar
Double Dip Report
Assignment Map
Visit Information
Due Date
Assign To
Southern California Gas Co.
Scheduled Date
Start Time
Duration
Actual Visit Date
10/10/2021
Time In
Time Out
Drive Mileage
0
miles
Drive Time
0.00
hours
120 Day Letter
Employee
Perez, Amanda
Outcome
Work Complete
Cancel
On Hold
Reason
Call Details
**Check Reissuance Type
AP 120 Day Letter
**Phone Number
949-923-0340
**Payee Name Needs Correction?
No
**Payee Address Needs Correction?
No
**Check Number (to be voided)
2155832
Corrected Payee Information
SAP Details
Has Check Been Cashed?
No
Re-Issue in SAP
X
Void/Cancel
(Click to Select)
Date Check Voided
Void Requestor
Ashbey Garcia
Stolen/Lost
X
Destroyed/Unusable
(Click to Select)
Clearing Doc (200 number...)
2002879936
Void Comment
Enrollment Number 12877290
Comments
Cancel check request sent to AP for reissue- APerez
CX received a 120 day letter and sent back letter indicating no changes in address and name. Asking for a check reissuance as check has not been cashed. AFernandez
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19
20
21

11b.


Check Re-issuance - On Hold
Save
Close
Enrollment Profile
Calendar
Double Dip Report
Assignment Map
Visit Information
Due Date
Assign To
Southern California Gas Co.
Scheduled Date
Start Time
Duration
Actual Visit Date
10/10/2021
Time In
Time Out
Drive Mileage
0
miles
Drive Time
0.00
hours
120 Day Letter
Employee
Perez, Amanda
Outcome
Work Complete
Cancel
On Hold
Reason
Awaiting AP Void
Call Details
**Check Reissuance Type
AP 120 Day Letter
**Phone Number
949-923-0340
**Payee Name Needs Correction?
No
**Payee Address Needs Correction?
No
**Check Number (to be voided)
2155832
Corrected Payee Information
SAP Details
Has Check Been Cashed?
Yes
Date Check Cashed
Comments
Cancel check request sent to AP for reissue- APerez
CX received a 120 day letter and sent back letter indicating no changes in address and name. Asking for a check reissuance as check has not been cashed. AFernandez
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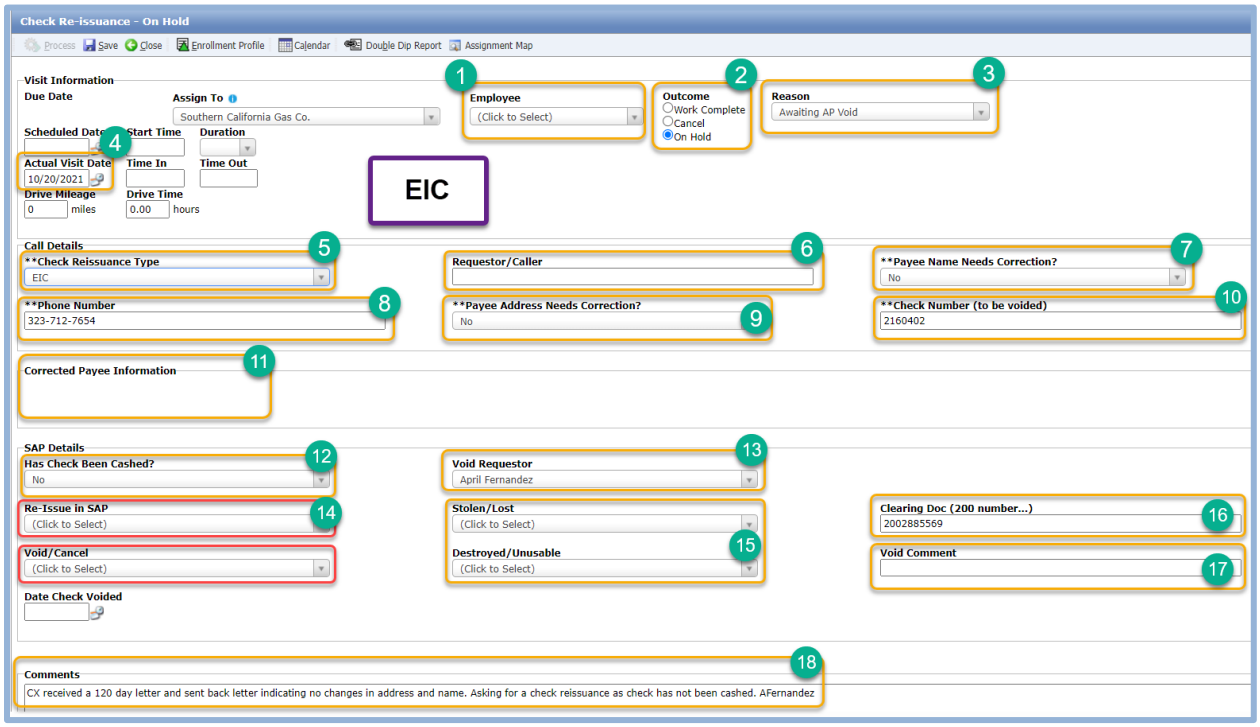
9. Check Reissuance Type: **EIC**
 1) **Employee**: Select your name from the dropdown list
 2) **Outcome**: **"On Hold"**
 3) **Reason**: **Awaiting AP Void**
 4) **Actual Visit Date:** Today's Date
 5) **Check Re-Issuance Type: EIC**
 6) **Requestor/Caller**: Enter customer's first and last name
 7) **Payee Name Needs Correction?**: Yes or No. If **YES** selected, another field will appear in the "**Corrected Payee Information**" section. Enter the correct payee name.
 8) **Phone Number**: Best contact number of the caller
 9) **Payee Address Needs Correction?**: Yes or No. Verify in EECP/CIS and with Customer - If **YES** selected, another field will appear in the "Corrected Payee Information" section. Enter the correct mailing/payee address.
 10) **Check Number (to be voided):** Enter check number.
 11) **Corrected Payee Information**: Enter the correct payee name and/or mailing address based on your selection from Steps 7 and 9.
 12) **Has Check Been Cashed?** Check SAP to verify.

 12a.- If NO, continue with the steps below (Image 12a)

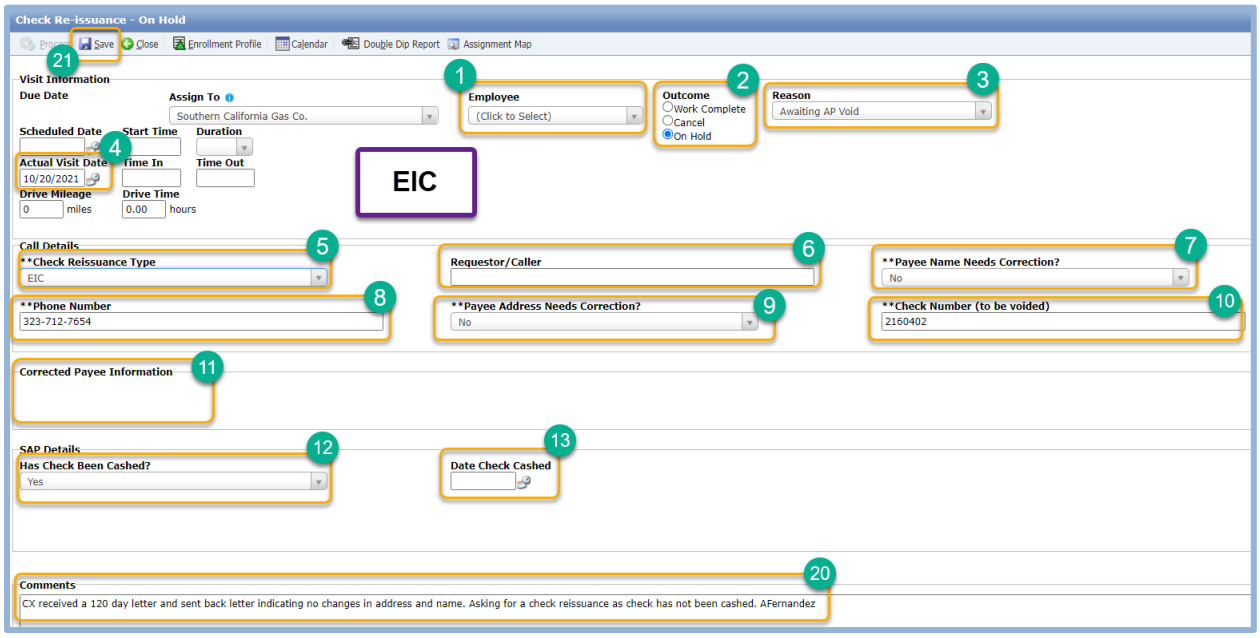
 12b.- If YES, complete Steps 13, 20 and 21 (Image 12b)

 13) **Date Check Cashed**: This field will only generate when **YES** is selected in Step 12.
 14) **Void Requestor**: Select your name from the dropdown list
 15) **Re-Issue in SAP**: **Only select "X" if there are NO changes needed to the payee name AND mailing/payee address.**
 16) **Stolen/Lost or Destroyed/Unusable**: Select the reason provided by the customer
 17) **Clearing Doc (200 number…)**: Information obtained from SAP
 18) **Void/Cancel**: **Only select "X" if there are changes needed to the payee name and/or mailing address. If this option is selected, Step 13 will be left empty.**
 19) **Void Comment**: Enter enrollment number
 20) **Comments**: Add any pertinent information needed for the check reissue.
 21) Click **SAVE** (must be done last)

12a.



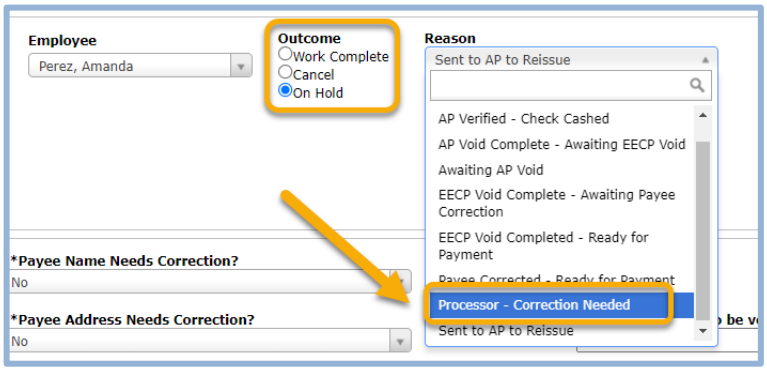
12b.



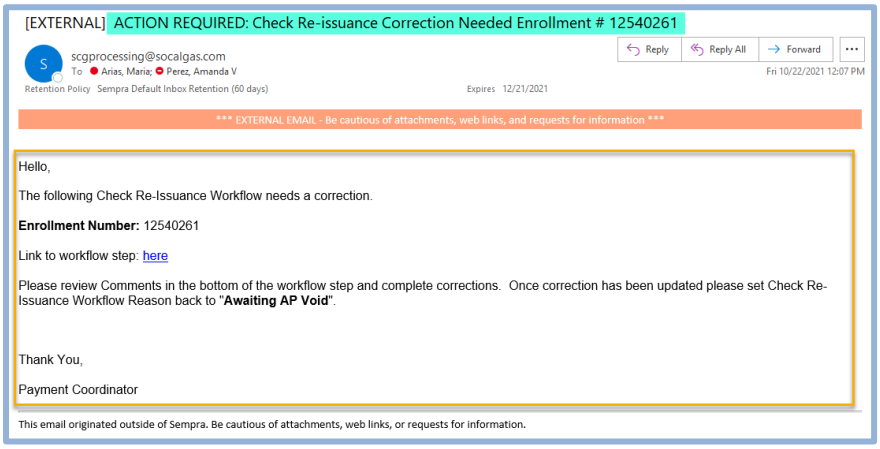
10. Leave the workflow Outcome/Reason to **On-Hold – Awaiting AP Void** so the Payment Specialist can review and send the request to the AP Department and EECPHelp to void check.

CHECK REISSUANCE WF ON HOLD REASON: PROCESSOR- CORRECTION NEEDED

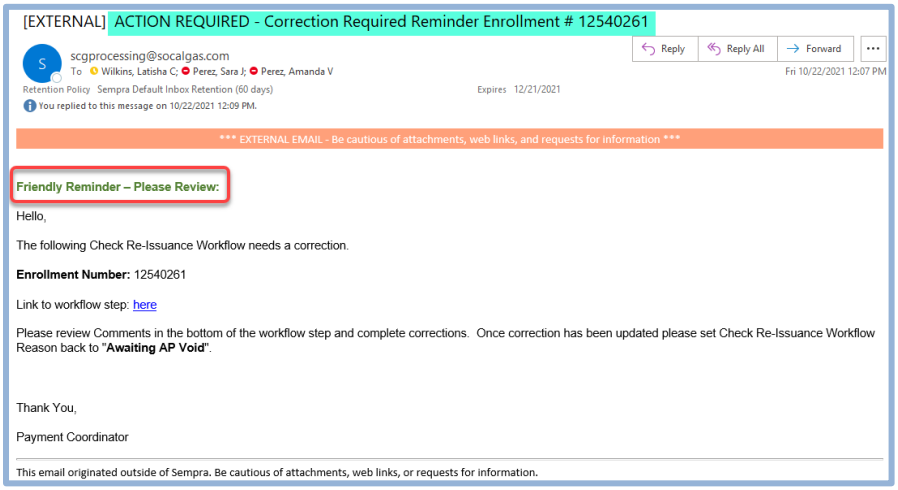
If the Check Reissuance WF is not filled out correctly (as shown in the previous section), the Payment Specialist will send it back with the On Hold reason- **Processor- Correction Needed.**



Once the WF is saved, an email monitor will be sent to the processor who completed the Check Reissuance WF.



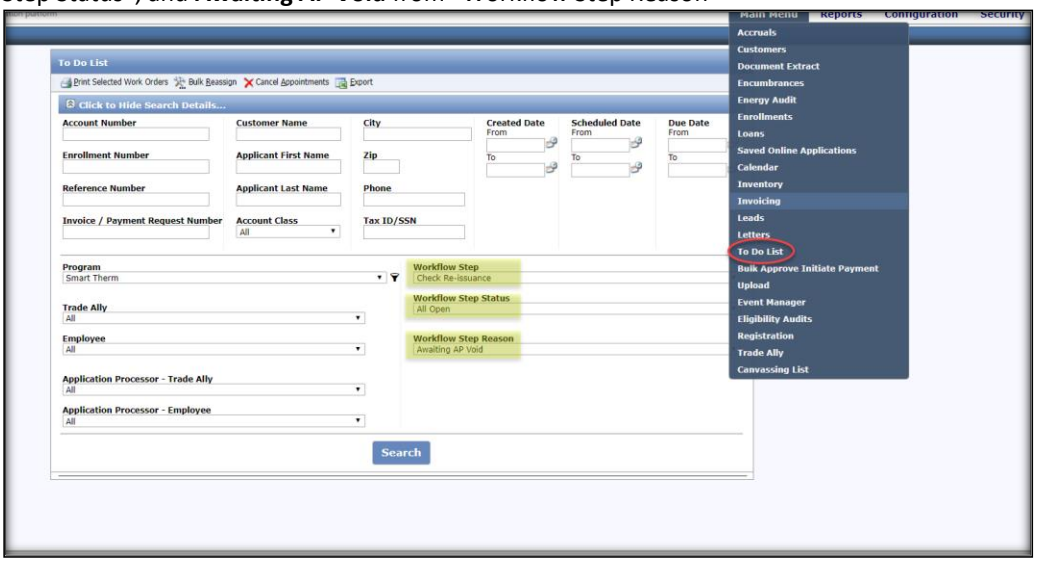
The processor will have two business days to complete the correction. If the correction has not been completed by day three, a Friendly Reminder notice will be sent.



REQUESTING CHECK TO BE VOIDED

Payment processor will coordinate the void process with AP automation.

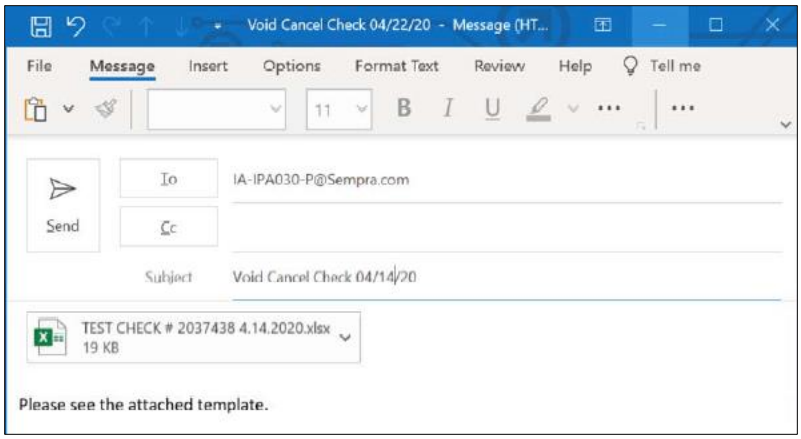
1. Select **To Do List** from Main Menu, then select **Check Re-Issuance** workflow step, All **Open** from "Workflow Step Status", and **Awaiting AP Void** from "Workflow Step Reason"



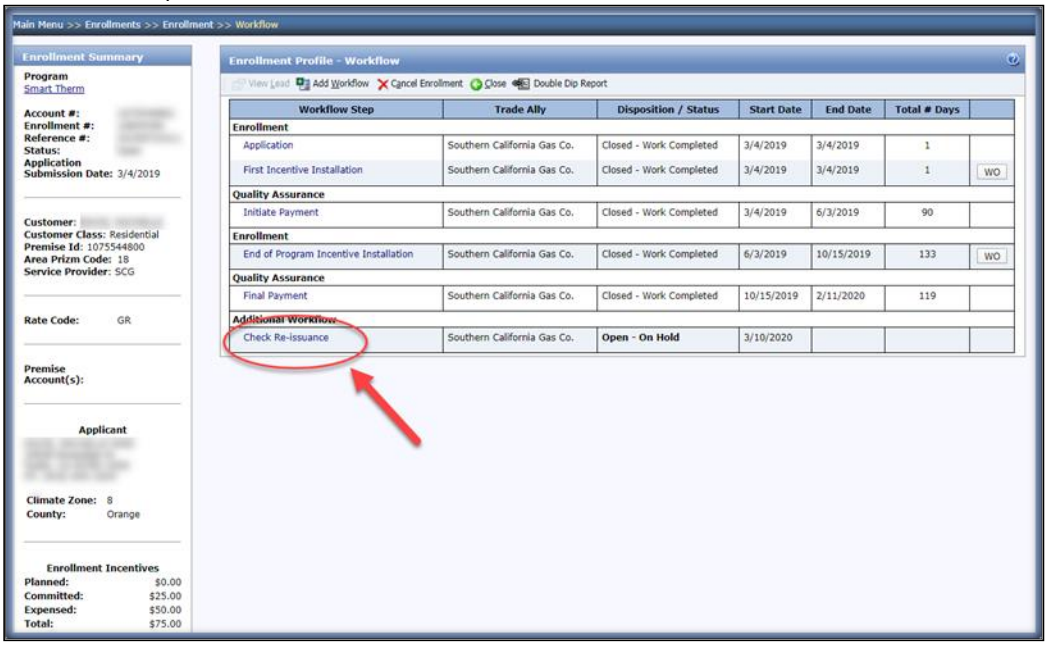
2. To Do List will show all enrollments that need check voided, select enrollment by clicking enrollment hyperlink. Email reminder will also be received



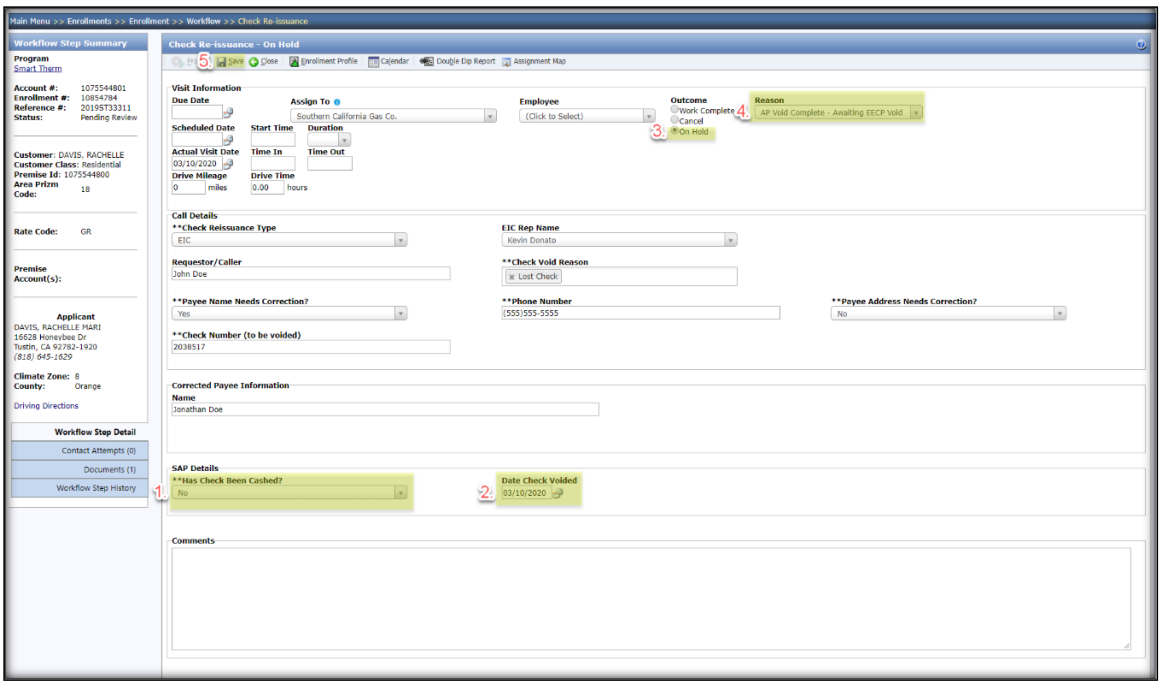
3. Verify check has not been cashed.
4. Generate EECP Report for each check that needs to be voided.
5. Download the EECP report into Excel format and save to your computer.
6. Create an email addressed to IA-IPA030-P@Sempra.com
7. Attach all workbooks as an attachment (may include as many as needed)
8. Email submit MUST contain the following details: "Void Cancel Check MM/DD/YY"



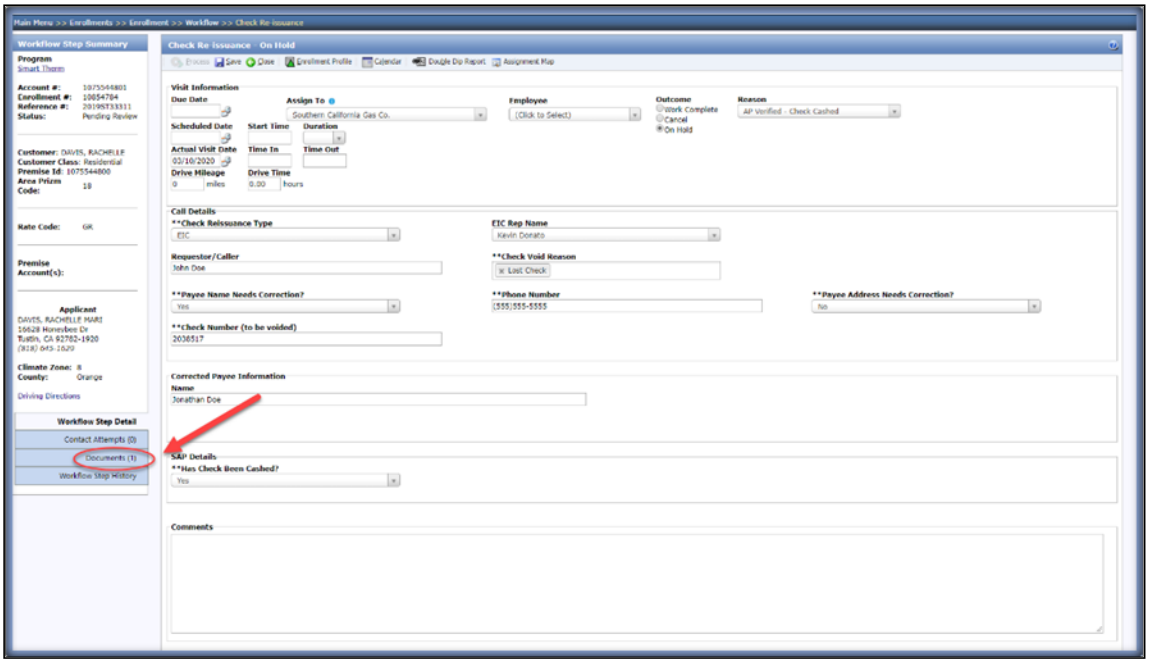
9. The automation will process the item during the next scheduled run. (Job starts at 12am and runs through all emails in the inbox based on the order they were received).
10. The following morning – Payment Processor will need to review the Output Report. The output report is uploaded at the conclusion of the run to the SharePoint site. Each item that was processed during the run is documented on the single report.
11. If check has been cashed select Check Re-Issuance Workflow Hyperlink and proceed to Miscellaneous Procedures Step #46.



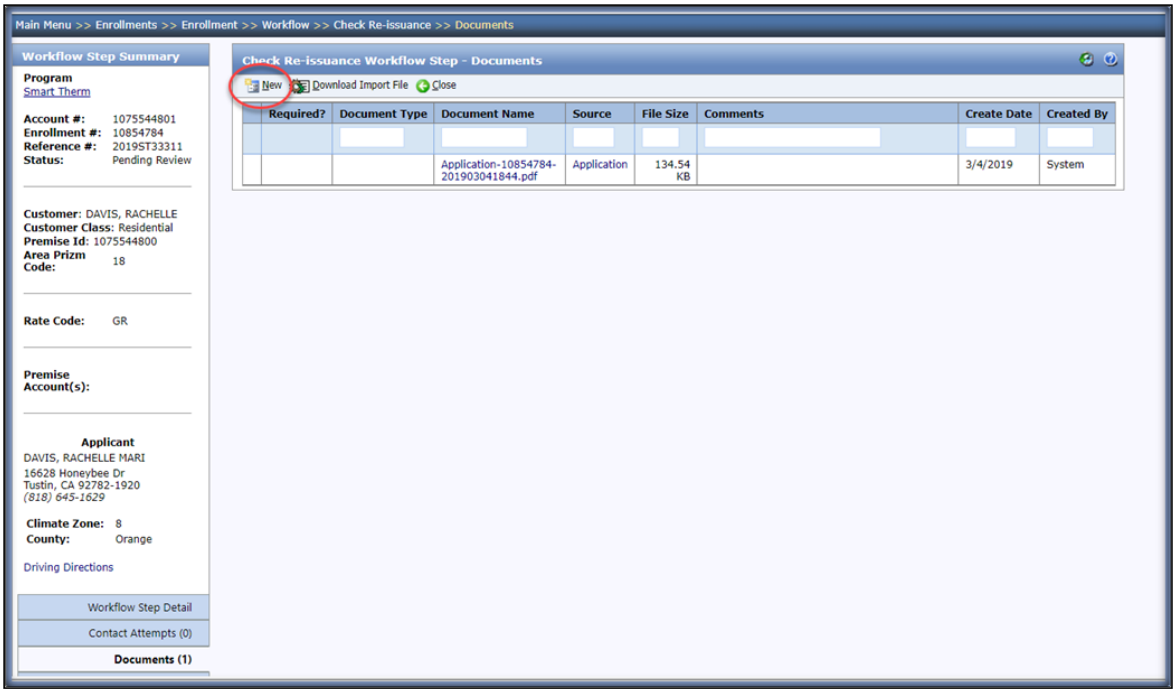
12. If check has NOT been cashed open check re-issuance workflow and complete following fields:
 1) Has Check Been Cashed: Select NO from dropdown
 2) Date Check Was Voided: Enter date check was voided
 3) Outcome: Keep on HOLD
 4) Reason: AP Void Complete – Awaiting EECP Void
 5) Save (MUST Be done Last)



13. Select Documents

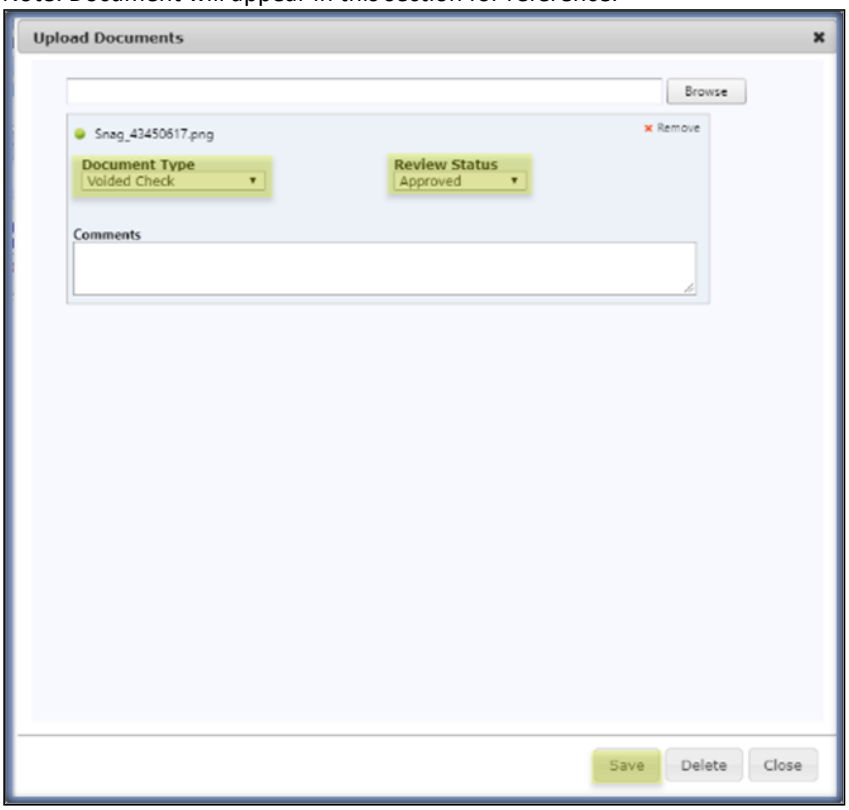


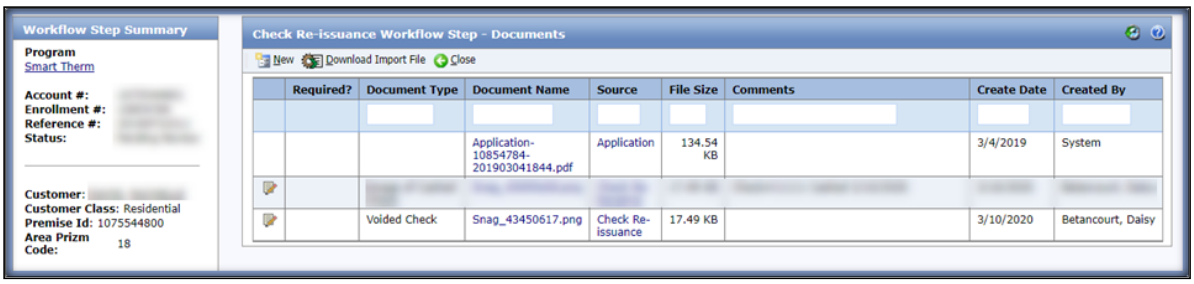
14. Select New



15. Attach SAP Screenshot of Voided Check by selecting Browse and attaching a copy of voided check and fill out the following:
 1) Document Type: Voided Check
 2) Review Status: Approved
 3) SAVE

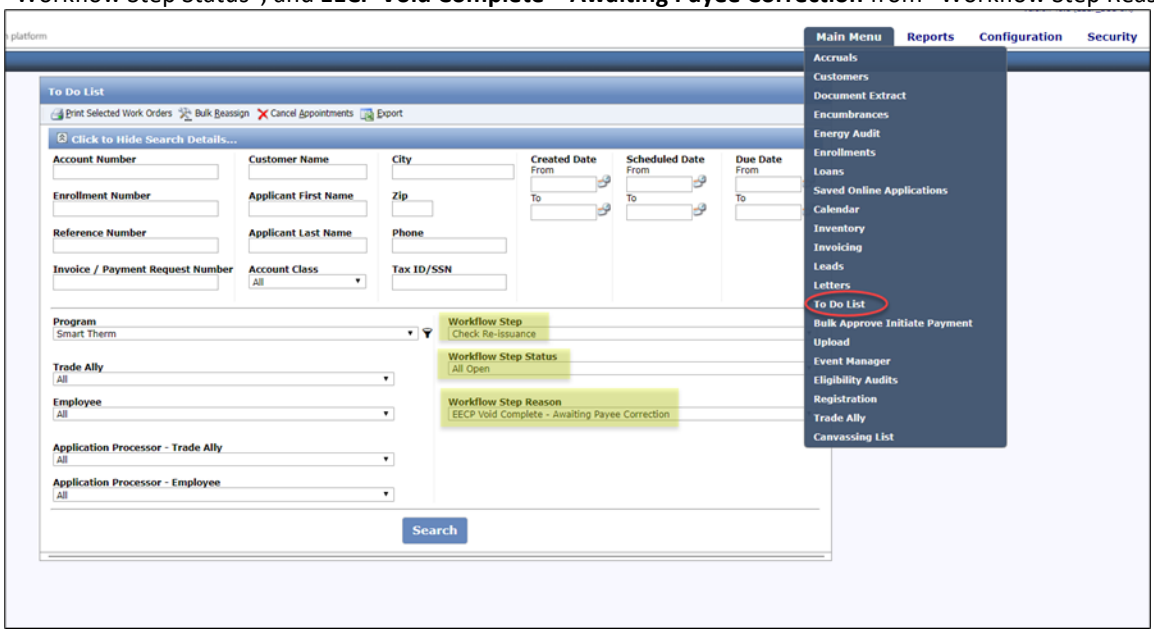
 Note: Document will appear in this section for reference.



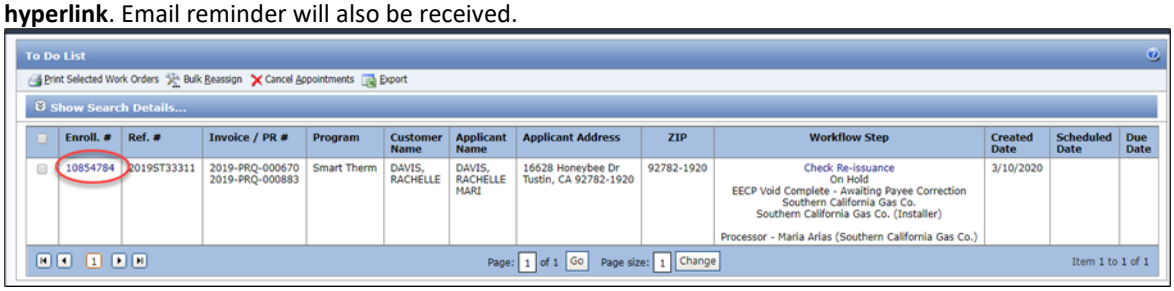


PAYEE CORRECTION REQUIRED

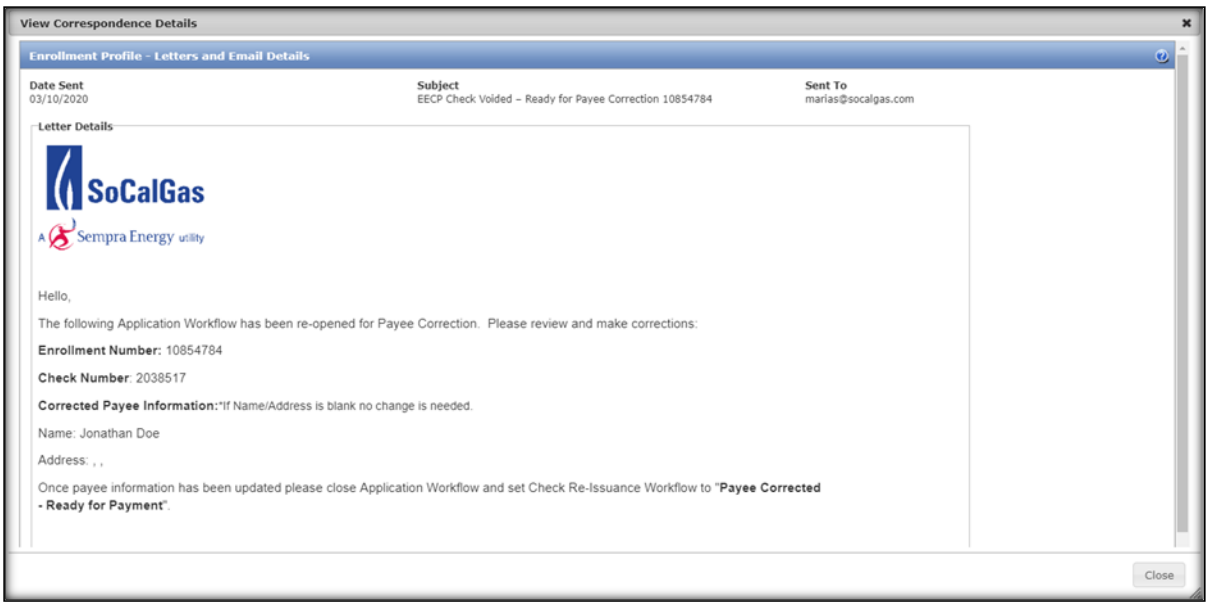
1. Select **To Do List** from Main Menu, then select **Check Re-Issuance WF** "Workflow Step", All Open from "Workflow Step Status", and **EECP Void Complete – Awaiting Payee Correction** from "Workflow Step Reason"



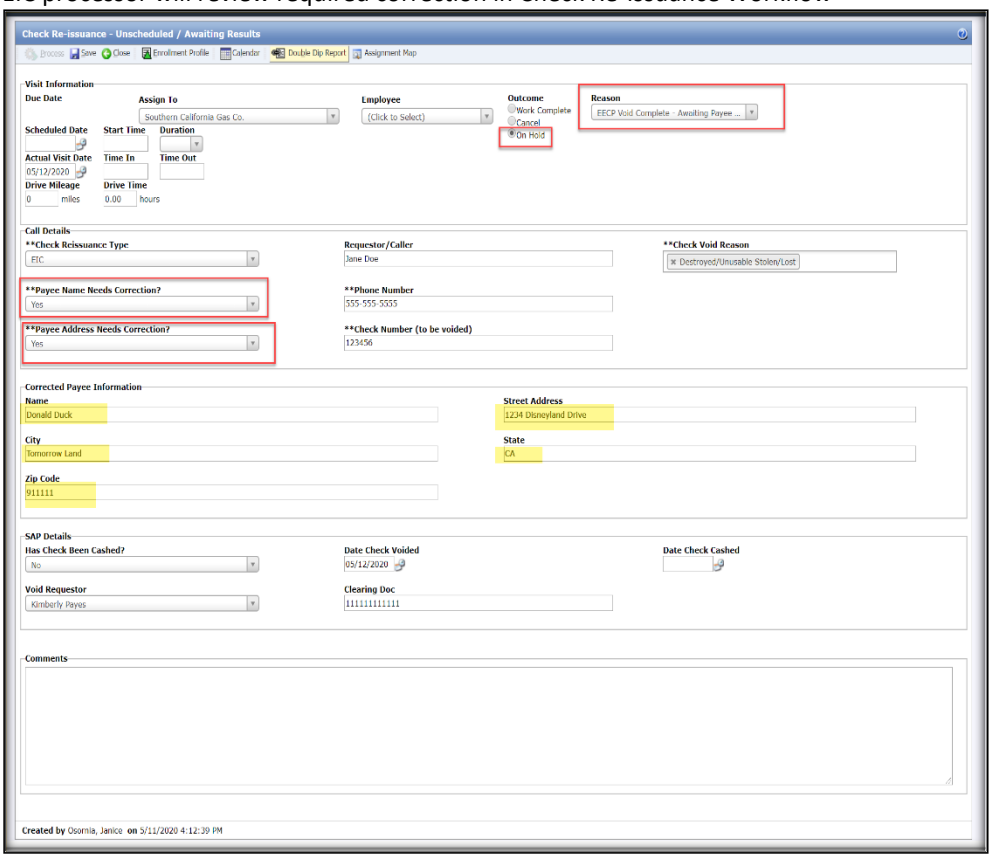
2. To Do List will show all enrollments that need check voided, select enrollment by clicking **enrollment hyperlink**. Email reminder will also be received.



Email Sample:



3. EIC processor will review required correction in Check Re-Issuance Workflow

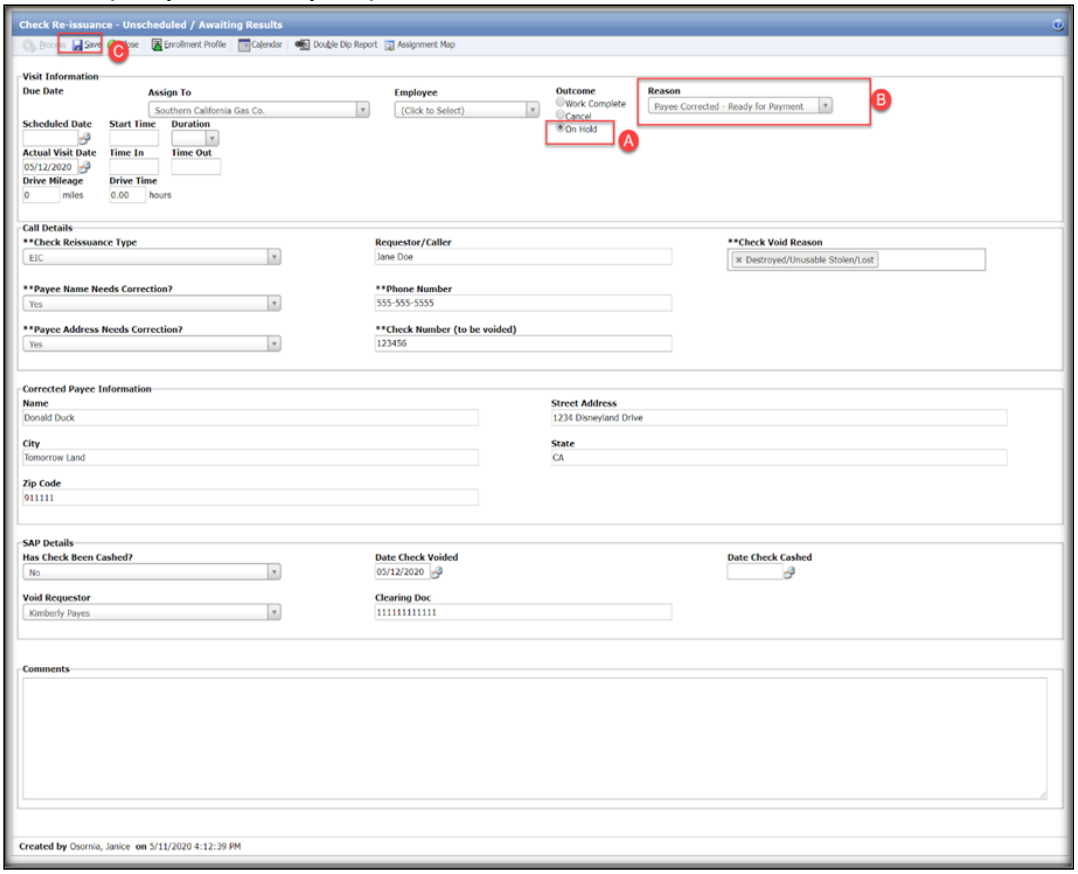


4. EIC Processor will make corrections in Application Workflow (Payee Section) and close Application Workflow once complete.

5. EIC Processor will **update** Check Re-Issuance Workflow:
 a. **Outcome**: Keep on **HOLD**

b. **Reason**: Payee Corrected – Ready for Payment

c. **SAVE (Complete this step last)**

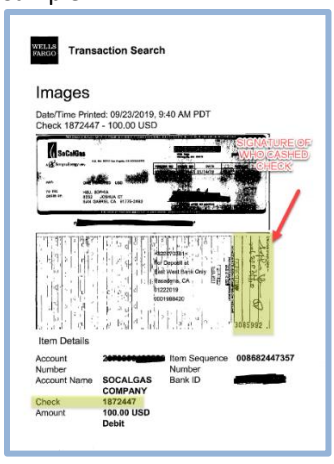


****Placing the enrollment On-Hold – Payee Corrected – Ready for payment alerts the payment processor that this enrollment is now ready for a new payment request to be generated.**

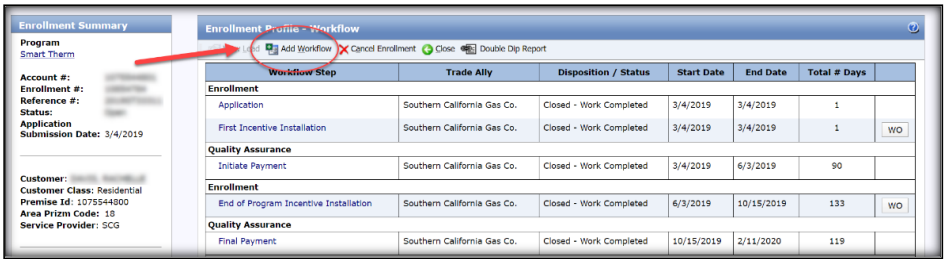
COPY OF ENDORSED CHECK OR ADDITIONAL INFORMATION FROM AP

A Check Endorsement provides a signature image on the back of check at the time it was deposited. A customer may request this information if they do not recall cashing the check. The information can be obtained from Accounts Payable.

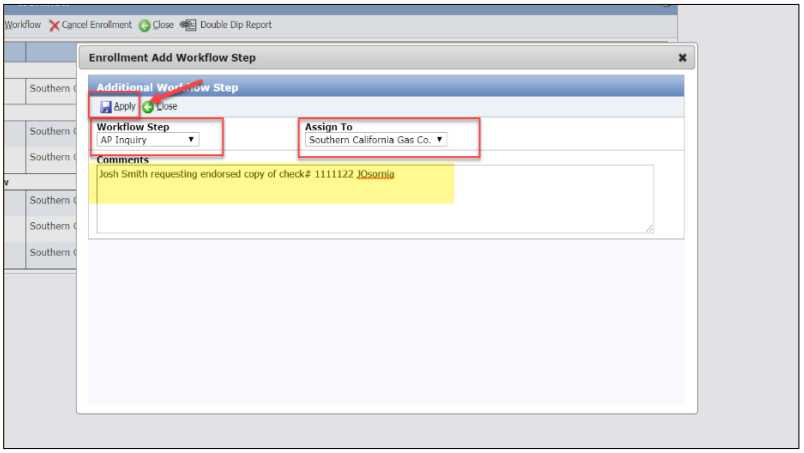
Sample:



1. Select **Add Workflow**



2. Add **AP Inquiry Workflow**, Assign to **Southern California Gas Co** and in Comments section identify what additional information the customer is requesting. Then select **Apply**.



****Payment Team lead will review AP Inquiry WF and will provide resolution.**

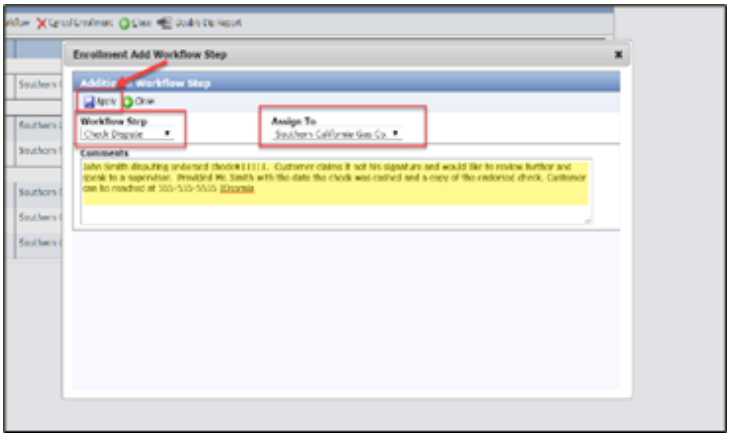
CUSTOMER UNSATISFIED/DISPUTES ALL INFORMATION PROVIDED

Processor receives a call and verifies check HAS been cashed initially, then a Check Re-Issuance Workflow is NOT needed. Processor MUST inform customer of check encashment date. If customer is **UNSATISFIED**, then add AP Inquiry Workflow to request Check Endorsement.

Note: Check Endorsement provides a signature image on the back of check at the time it was deposited

1. Select **Add Workflow**.
2. Select **Check Dispute** and **Southern California Gas Co**. enter why customer is disputing check and select **Apply**.



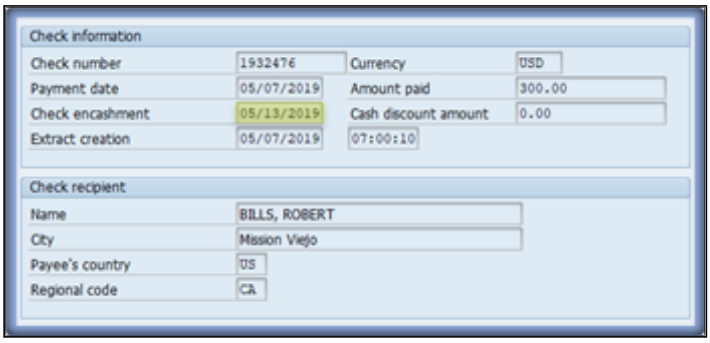


****Payment Team lead will review Check Dispute Workflow and will provide resolution.**

CHECK CASHED – CUSTOMER SATISFIED

Processor receives a call and verifies check **HAS** been cashed initially, then a Check Re-Issuance Workflow is **NOT** needed. Processor MUST inform customer of check encashment date and follow **satisfied** scenario.

1. Inform customer of Check Encashment Date



2. If customer is **SATISFIED**, then call ends. Check Re-issuance WF is not necessary.

Quality Assurance

WHAT IS QUALITY ASSURANCE (QA) AND ITS BENEFITS?

- QA is a function to monitor consistent adherence to program guidelines and standards. The QA Review is completed before the rebate or incentive moves to the Payment Initiation Phase.
- The process ensures incentives are paid without any auditing issues. Potential issues MUST be addressed during the QA process. When there is a need for corrective action, the QA Specialist coordinates corrections with the processing team by submitting the enrollment through a QA Correction Workflow (WF).
- A QA Specialist may not change or update customer or rebate information in EECP. The QA Specialist may only send back for correction through an EECP WF.
- The QA process may delay payment if errors are caught. QA supports Accounts Payable's involvement by removing the need to solve issues and the need for corrective action after a check is paid.

MINIMUM QA REQUIREMENTS

- ✓ Verify all EECP Workflows show "Closed- Work Completed". ***(All)***
- ✓ Verify there is no Double Dipping (Previous Participation). ***(All)***
- ✓ Verify Equipment Qualification Eligibility, Model, & Serial Number (when applicable). ***(All)***
 - Serial number is **ONLY** required for TWH, for all other measures the Serial Number is not a required field in EECP.
 - If customer provides a picture of the Serial Number from the box, sticker or model plate ensure what was entered matches the image provided.
 - The serial number does not need to be on the receipt/invoice, but if it is verify it matches what was entered in EECP.
 - In cases where the serial number on the invoice and the picture the customer provided (seen on sticker, box, equipment) **DOES NOT MATCH**, processor can update EECP with correct serial # from the picture since we know it is accurate and add note stating why they updated. **No updated invoice or geotagged photo is necessary.**
 - Any line item that does not have a ** is an optional field and the customer will not be penalized if they do not have those items.
- ✓ Verify Payee and/or mailing address matches application ***(Mail Ins)***
 - If payee is different from the Account Holder, verify the Tax Information has been provided. If not provided, it would be a QA fail. ***(All)***
- ✓ Verify a note indicating "DD and model # verified" is provided in Comments of Application and Notes tab in enrollment. If the note is the only item missing to pass the enrollment, QA can add the note. ***(All)***
- ✓ Verify Applicant email address and primary phone number are entered and/or updated. If Daytime Phone Number on Application is different from EECP ensure it is added in the Alt Phone field. ***(Mail Ins)***
- ✓ Verify customer signature and signed date is on application. Post-marked date may be used if no signature date. If no post-marked date, then Installation Date may be used. A note will be there indicating how install date was obtained. ***(Mail Ins)***
 - If signee is different from the account holder, verify a note has been added stating who the signee is. ***(Mail Ins)***
- ✓ Pg. 3 requirements (see Appendix for cx application): Licensed Contractor Box at bottom of application box MUST be checked by contractor and customer for Furnaces ONLY. If the customer has provided a proof of permit closure, but did not check the box, it is okay to proceed with the application. ***(Mail Ins)***

- ✓ If Property Owner completed and signed application on their tenants' behalf, then proof of ownership MUST be attached. (i.e. property tax form, escrow, mortgage payment or Deed documents) For more information on acceptable documents, look at FAQ ***(Mail Ins)***
- ✓ First Name and Last Name = Verify applicant is the COR or is on the account in CIS, or is property owner with proof of property ownership
 - If applicant is NOT on the account, but one of the following matches the COR information processor will process the enrollment:
 - Last name
 - Phone number
 - Email

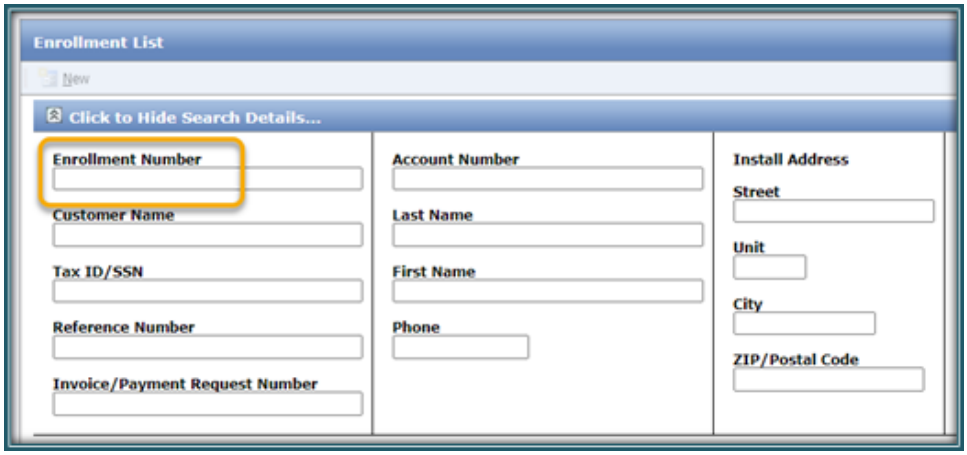
 -A note will be entered by the processor stating what piece of information matched the COR. ***(Online and Mobile)***
- ✓ Verify receipt/invoice is attached. Invoice MUST always include the retailer/contractor, purchase date, model number, quantity of measures purchased, itemized and/or total purchase price, and showing paid in full and/or zero balance/method of payment (MOP). ***(All)***
 - Store receipts will be itemized
 - Contractor receipts do not need to be itemized and can be a total price
 - Retailer/Vendor Information
 - If receipt is from Retailer, Retailer name only is sufficient
 - If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:
 - Contractor name and phone number
 - Contractor name and address
 - Contractor name and email
 - Price of equipment or total price (there needs to be at least one)
 - The customer will ONLY be rebated for the amount they paid up to the purchase price of the unit, this DOES NOT include additional charges such as shipping or taxes.
 - Verify the processor has adjusted the incentive using the "Incentive/Adjustment Correction" measure to lower the incentive to match the invoice if applicable. ***(All)***
 - Paid in full/zero balance/method of payment/PAID stamp (Cash on delivery (C.O.D.) will be accepted as proof of purchase if it's accompanied by a delivery receipt, or an install date is noted on the invoice).
 - Partial payments will be accepted if the amount paid covers the rebate amount.
 - Financing will be accepted as a form of payment.
 - If invoice states "Term(s) = Credit Card, Check, or Cash" the balance must reflect there was a payment made that covers the incentive amount.
 - If customer provides a check for payment, it must be a copy of the front and back of the endorsed check or copy of the check from their bank. Carbon copy or the front of the check only will not be accepted.
- ✓ Verify processor has adjusted the address if the invoice explicitly states an "Install Address" or "Job Location" to match the Installation Address on the enrollment. If it is not changed, verify there is a note as to why it was not changed.
- ✓ Verify Pricing Dates, Purchase Dates and Installation Dates (ID- from Mail in Application). ***(All)***
- ✓ For enrollments selected for random inspection, verify the inspection passed by checking the Inspection WF. ***IF*** an inspection report is attached, it MUST include both inspector and customer signatures. ***(All)***
- ✓ Verify note "Hirsch invoice verified." is added for Hirsch approved invoices missing MOP. ***(All)***
- ✓ Verify proof of permit is attached for Central Natural Gas Furnaces only. ***(All)***

✓ ***Anytime a processor deviates from standard procedures a note will be entered in EECP. (All)***

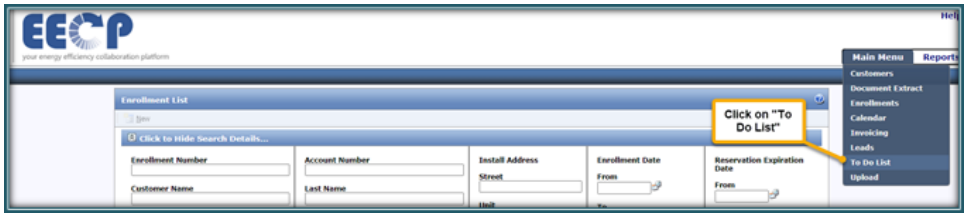
PROCEDURES

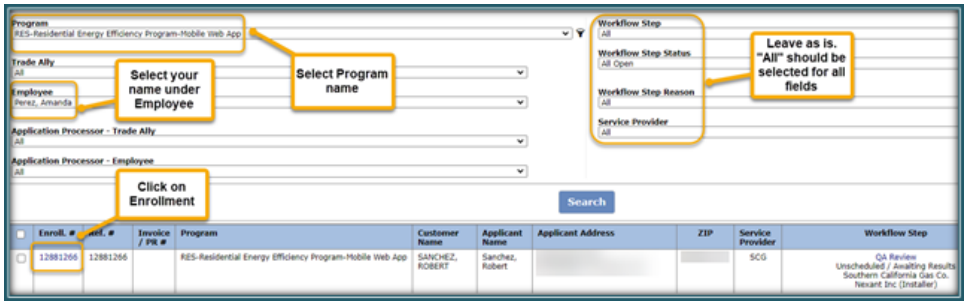
HOW TO FIND AN ENROLLMENT IN EECP

1. From the EECP "Main Menu", select "Enrollments."
2. Enter the Enrollment Number and click "Search"



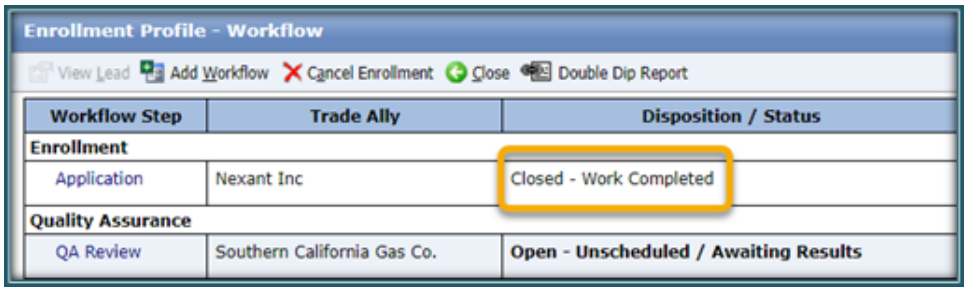
OR search from your "To Do List"





HOW TO BEGIN THE QA PROCESS

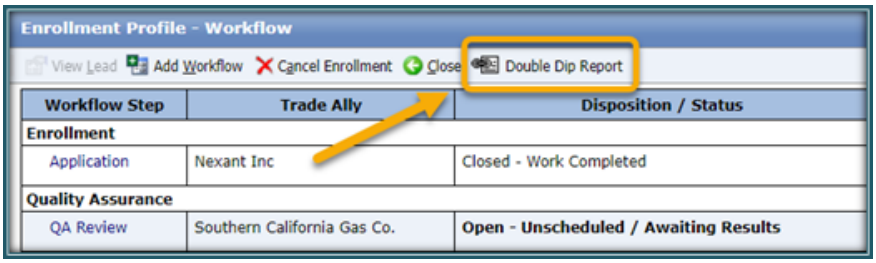
3. Ensure all workflows preceding the QA Review Workflow (WF) are "Closed-Work Completed."



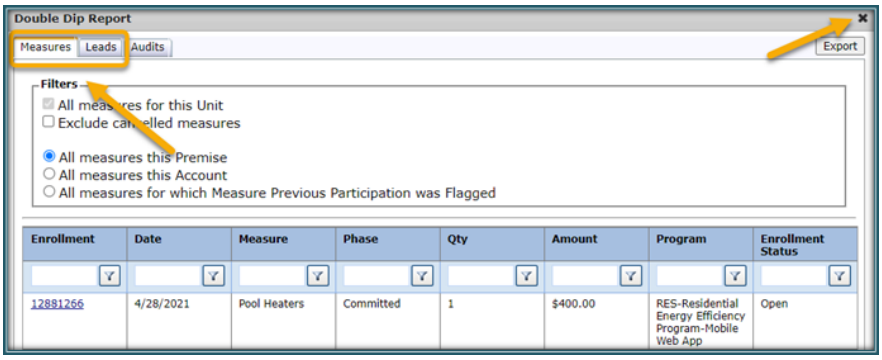
DOUBLE DIP

- Double Dipping – Applying to two different programs for the same measure and same customer or twice for the same measure and same customer within 5 years.

4. Click on "Double Dip Report."

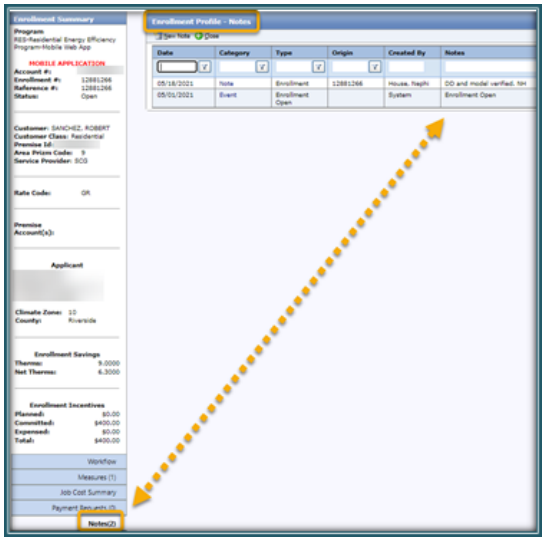


5. A pop-up window with double dip information will appear. Check both the Measures and Leads tabs to ensure there is no previous participation (Applicant may not apply for same the measure within a five-year time frame). Press the "x" at the top right-hand corner to close out of the double-dip report.



NOTES TAB

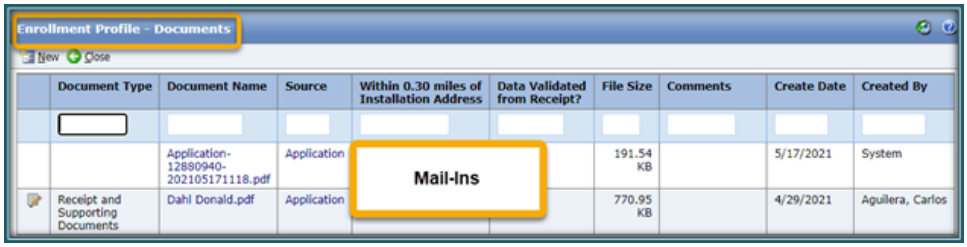
6. From the Enrollment Profile, open the "Notes" tab and read all pertinent information. Click "Close" when done.



DOCUMENTS TAB

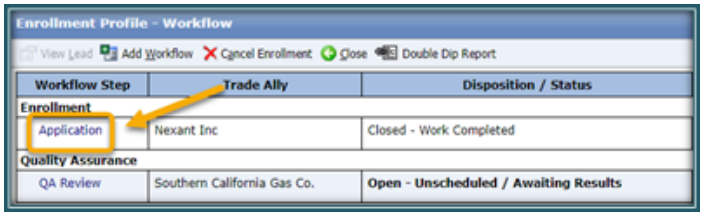
1. From the Enrollment Profile, click on the Documents Tab. **Mobiles** and **Onlines** may have more than one document to review. **Mail ins** typically have one document labeled with the customer's first and last name.





2. Click on "Enrollment" from the top of the page and select "Application." This will take you to the Applicant Information workflow.





APPLICATION WORKFLOW

3. From the Applicant Information section, verify all pertinent fields from the list below by cross referencing with the Signed Customer Application. Any discrepancies MUST be noted.

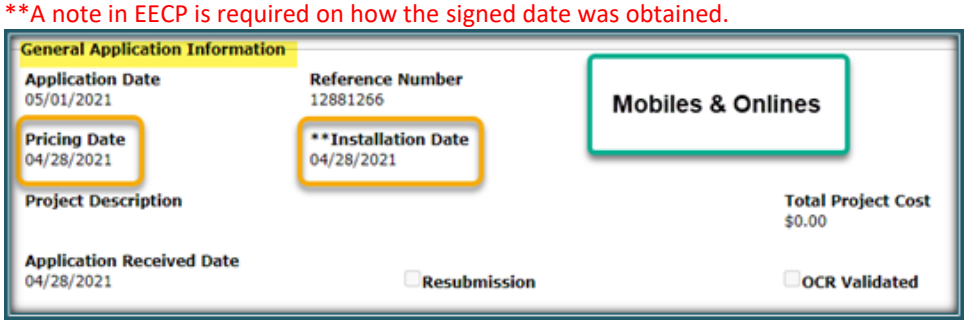
GENERAL APPLICATION INFORMATION

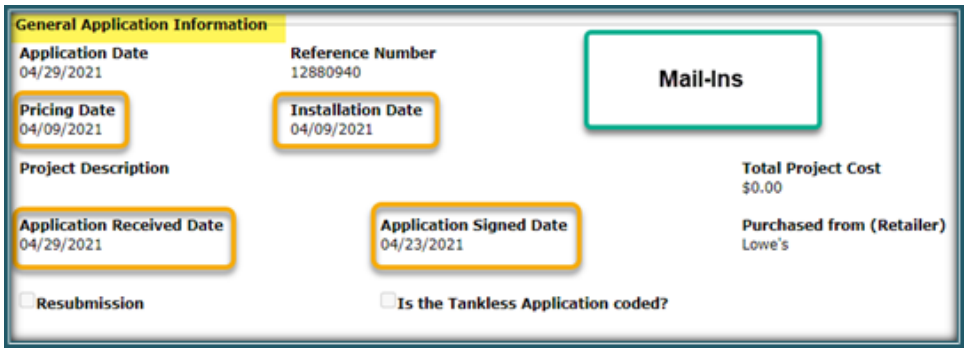
- Pricing Date (same as Purchase Date unless otherwise directed by Team Lead due to IO) See Pricing Date (2022 IO) for more information regarding 2022 Rebate Year ***(All)***
- Installation Date (for ***Mail ins***, verify ID from application)- If customer does not provide Install Date and an official Install Date is provided on the invoice, the official Install Date may be used.
 - If invoice is from contractor, invoice date can be used as the install date.
 - If invoice is from retailer and no install date is seen, receipt date can be entered but enrollment should be sent to inspection.

 **A note in EECP is required on how the install date was obtained as well as why it is being sent to inspection.
- Application Received Date (according to Date Stamp on Application). ***(Mail Ins)***
 - If no stamp date, take the postmark date. (Notify Team Leads if no stamp date)
 - If no postmark date, take the signature date.
 - If no signature date, take the date of installation.

 **A note in EECP is required on how the received date was obtained.
- Application Signed Date (according to Date provided by CX on Signature line) ***(Mail ins)***
 - If no sign date, enter the postmark date.
 - If no postmark date, enter the installation date.

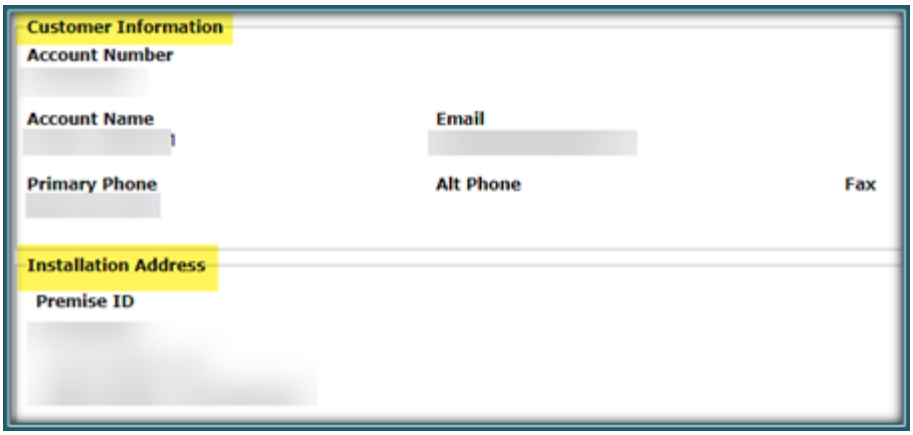
 **A note in EECP is required on how the signed date was obtained.





CUSTOMER INFORMATION & INSTALLATION ADDRESS

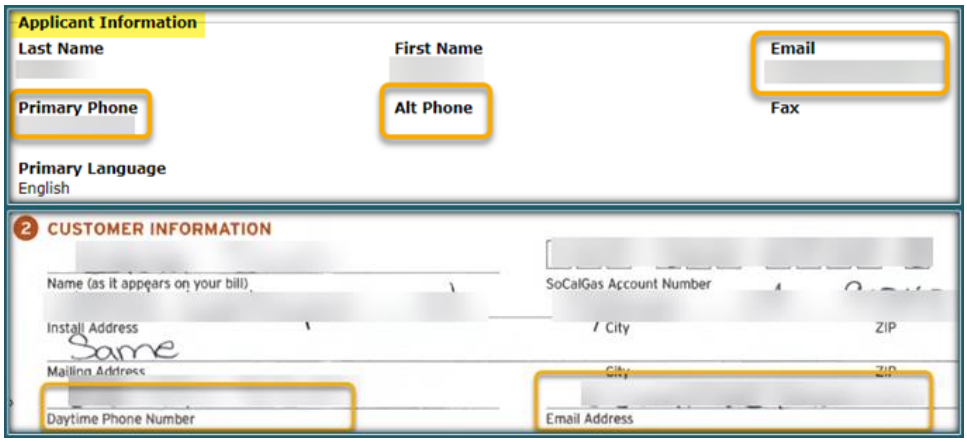
- QA does not need to verify information in these sections



APPLICANT INFORMATION

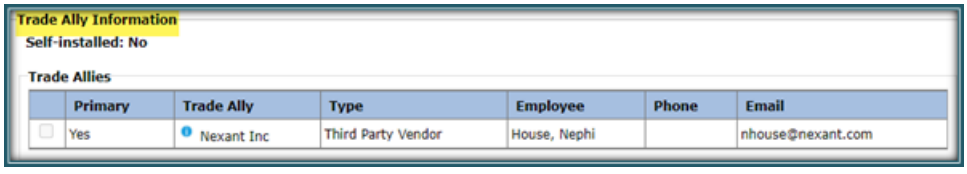
Mail ins Only- cross reference with information on pg. 3, Section 2 of the application (2nd screenshot).

- Primary Phone
- Alt Phone- if "Daytime Phone Number" is different from "Primary Phone" field, processor will enter secondary number in "Alt Phone"
- Email



TRADE ALLY INFORMATION

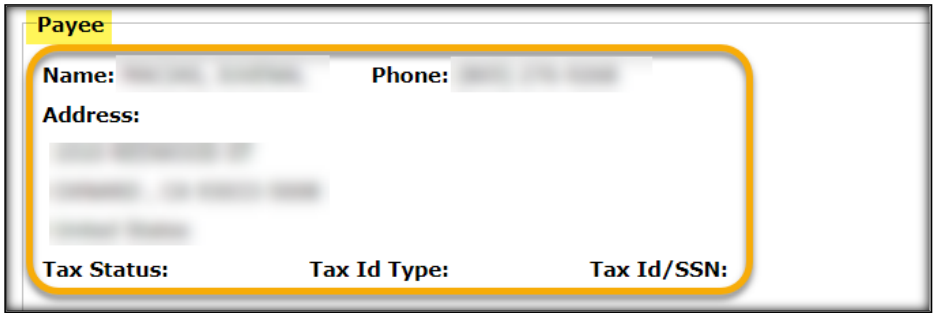
- Verify the Third Party Vendor Employee or SCG Employee is selected as "Yes" under "Primary" or whomever is processing the application.



PAYEE

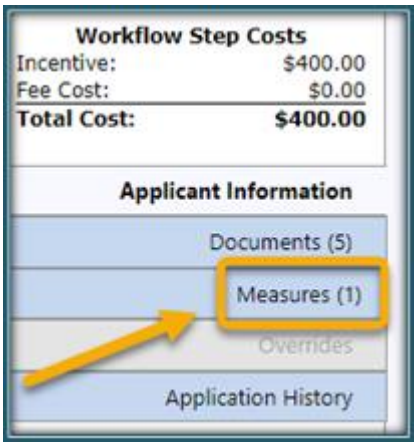
- Name

- Phone
- Address
- Tax Status- *not required unless payee is 3rd party*
- Tax ID Type (EIN or SSN)- *not required unless payee is 3rd party*
- Tax ID/SSN- *not required unless payee is 3rd party*



MEASURES TAB

4. Click on the "Measures" tab from the Application Workflow.



5. From the Measures page, verify all pertinent information from the list below by cross referencing with the Signed Customer Application and Invoice. Any discrepancies MUST be noted. **NOTE: the fields may vary depending on the measure selected. See examples below.

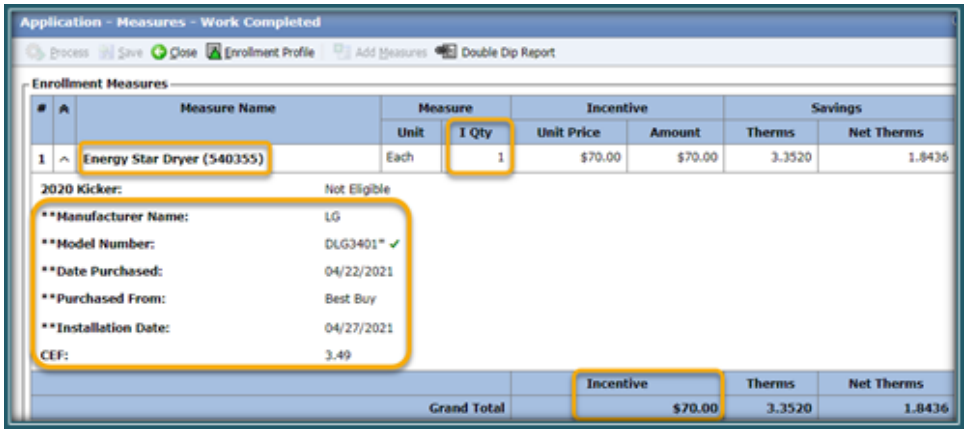
- ✓ Measure Code (see Appendix for Pricing Guide)
- ✓ Quantity (Verify a 1 is entered in each measure)
 - If customer is applying for 2 or more of the same measure, verify it is separated into 2 different measures
- ✓ Manufacturer Name
- ✓ Model Number (if there is no green check mark, and/or you see the word "Other" then a spec sheet MUST be attached except for the following with a *)
 - *Pool heater (Look at QPL or spec sheet to verify it qualifies)
 - *Fire inserts (Look at QPL or spec sheet to verify it qualifies)
 - *Ovens (Look at QPL)
 - *Furnaces
 - Clothes Dryer

- TWH
- SWH

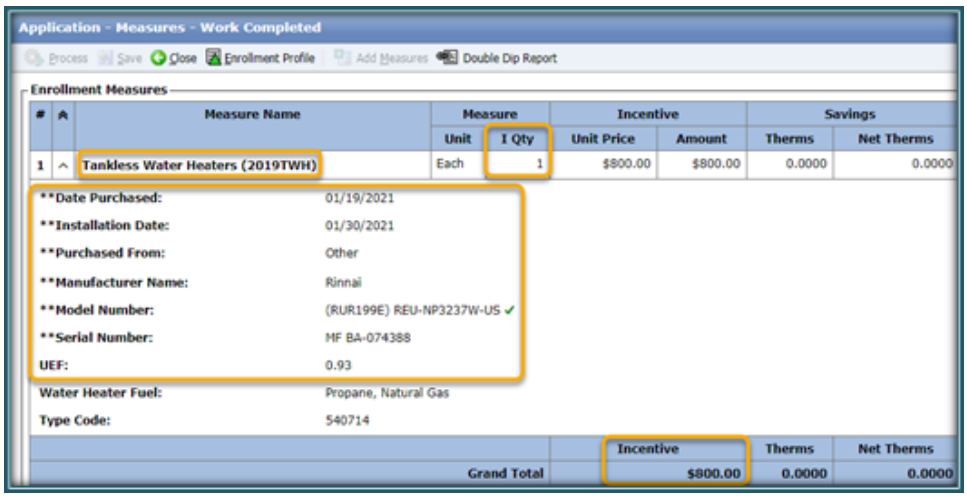
✓ Serial Number (if applicable)
- TWH Only

✓ Purchased From
✓ Date Purchased
✓ Installation Date
✓ UEF
✓ CEF
✓ AFUE
✓ Incentive amount (see Appendix for Pricing Guide)

A) Dryer



B) Tankless Water Heater (TWH)

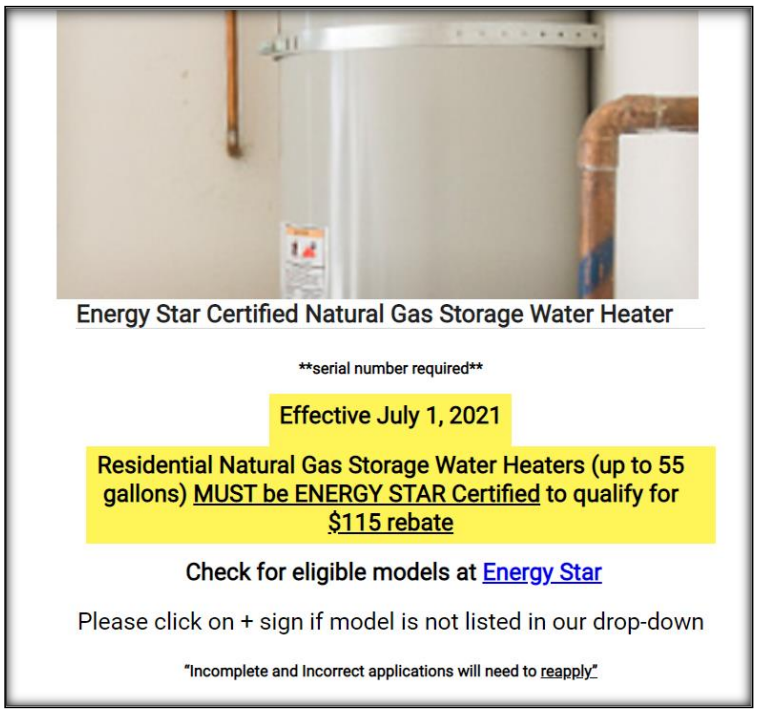


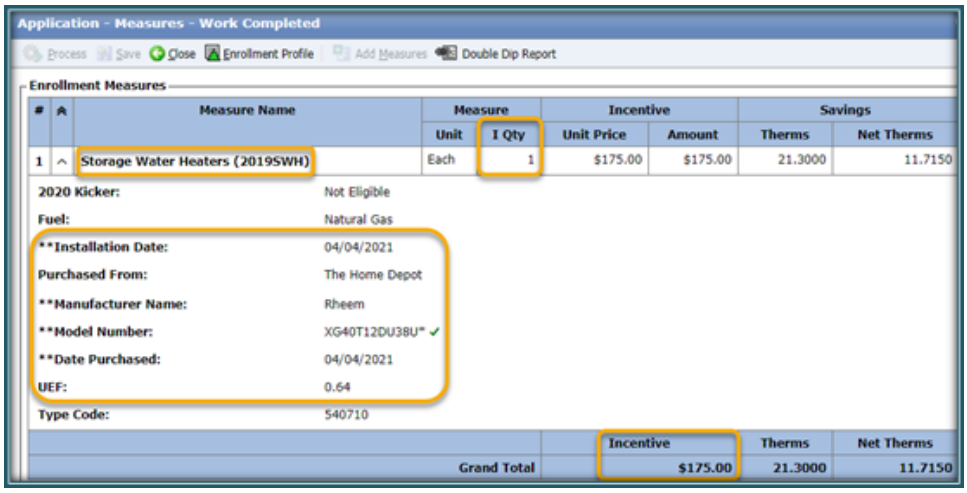
Storage Water Heater (SWH)

Effective 7/01/2021, there will only be one incentive amount for SWH's, $115. The SWH needs to be Energy Star (ES) Certified. If the model does not appear on the ES website, it may still be eligible if the processor provides specifications that show either a medium draw with a UEF of .64 OR high draw with UEF of .68. This applies to purchase dates of 7/01/2021 or later. Purchase dates **prior to 7/01/2021 will continue to receive the $175

incentive with a UEF of .64. The rebate amount depends on the Uniform Energy Factor (UEF) rating, min 0.64 to qualify and does not need to meet the draw requirement.

For example, if the SWH is a .64 UEF AND is high draw, then the customer qualifies for the $175 rebate amount and QA MUST verify a note was added indicating that it was a high draw, i.e. "SWH - (enter UEF of SWH) UEF high draw" **(this only applies for purchases before 7/01/2021)**





TWH Bundles

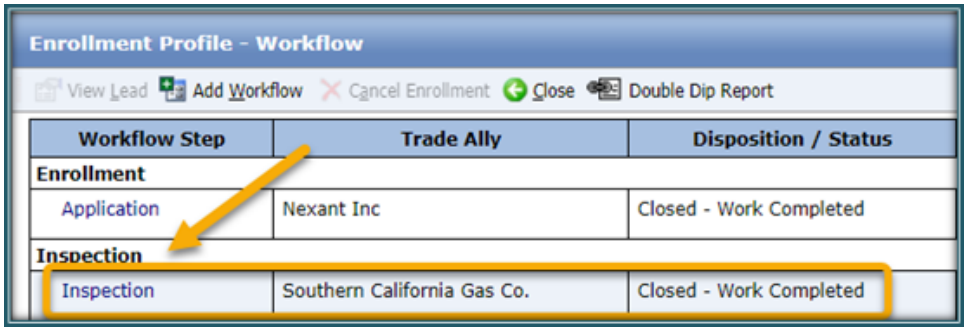
Here are some common TWH model numbers that are included as a bundle. This means they may have other model numbers which are equivalent to the original. This is important for QA to verify and make sure the correct spec sheet (if needed) is attached, or that the correct model number was entered correctly. For example, if the model number entered in the measures tab is "NRC663-FSV" and the processor attached a spec sheet showing the "EZTR40" bundle, this would be acceptable.

- Noritz EZ98 series = EZTR50
- Noritz EZ111 series = EZTR75
- Noritz NRC663-FSV = EZTR40



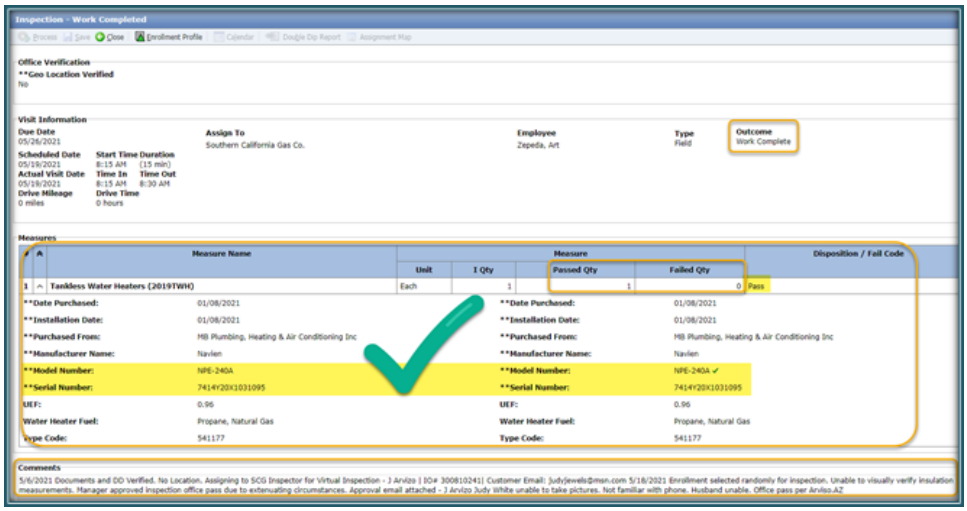
DID THE INSPECTION PASS?

6. If the enrollment was randomly selected for inspection, then QA MUST verify the Inspection WF indicates a "Pass". Click on "Enrollment" at the top of the Measures page then select Inspection.

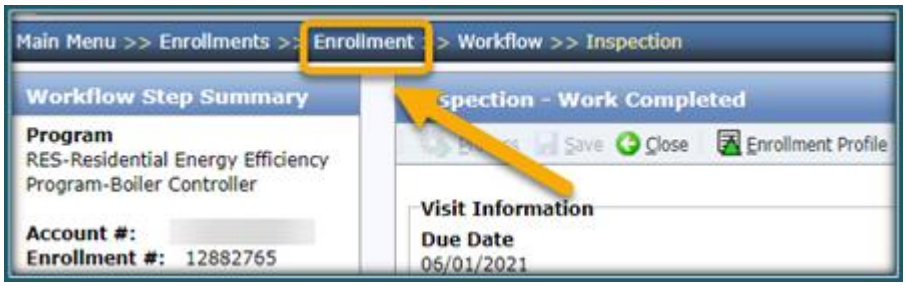


**NOTE: If the Inspection was completed virtually (Vimotely), an Inspection Report and Installation photos are not required.

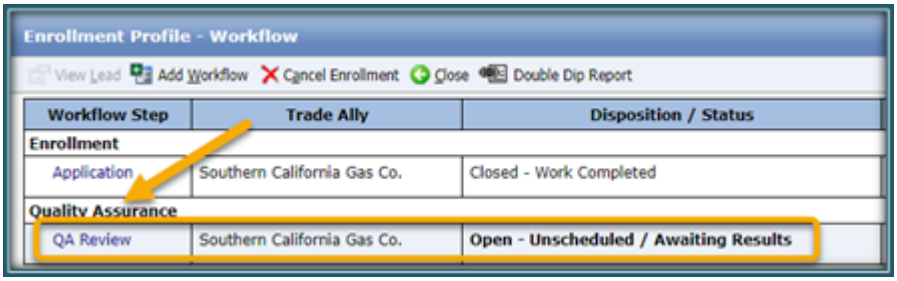
7. Check to see if the Inspection passed with the correct measure, Passed or Failed Qty, Disposition, Model Number, Serial Number and read the **Comments** at the bottom for pertinent information. If the Inspection failed, then the outcome would be a "QA Fail".



8. Click on “Enrollment” from the top of the Inspection Workflow. Then click “QA Review”

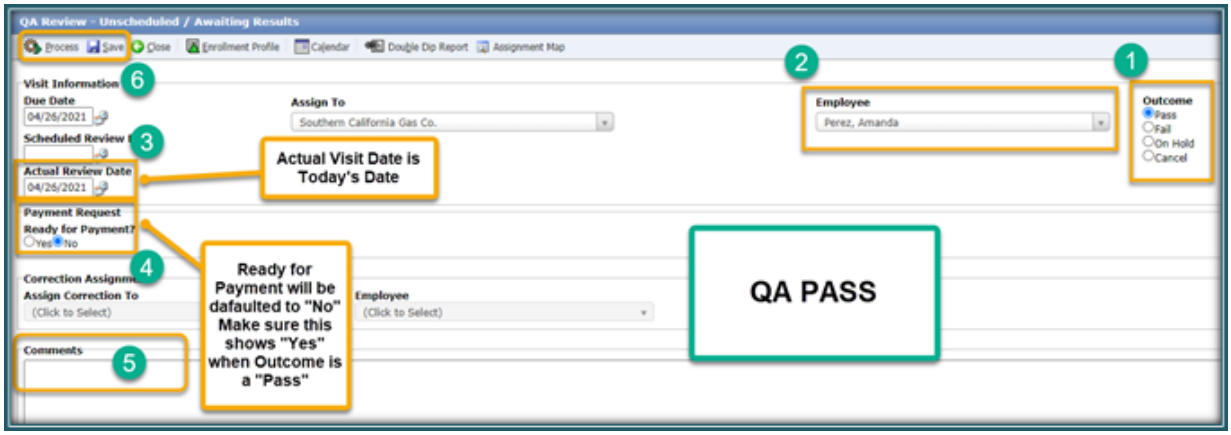


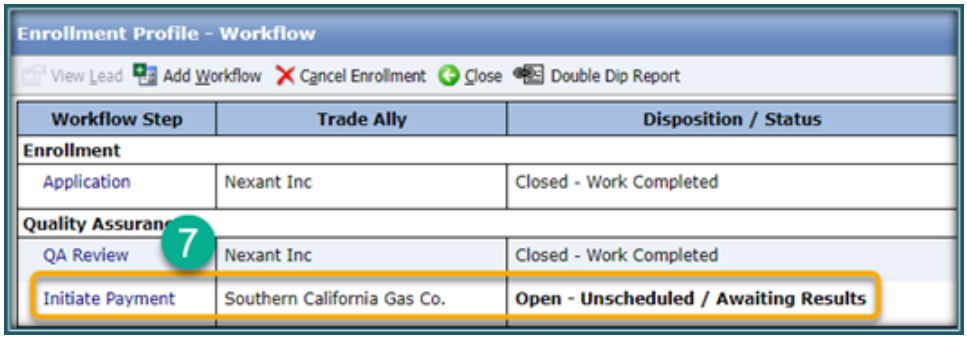
QA PASS



9. If the enrollment has passed QA Review and is ready for Initiate Payment:

1) Select “Pass” under **Outcome**
2) Select your name from the **Employee** dropdown menu
3) Select today’s date for the **Actual Review Date**
4) Select “Yes” in the **Payment Request** Field (*NOTE: it is important that “Yes” is selected, otherwise EECP will not trigger an Initiate Payment Workflow)
5) In the **Comments** field, add a brief note stating enrollment is ready for payment and enter your initials (This step is optional for passing enrollments)
6) Select “Save” and “Process”
7) Go back to the Enrollment Profile and ensure an “Initiate Payment” Workflow was generated. (*If Initiate Payment Workflow does not generate, please notify Processing/QA Team Leads)

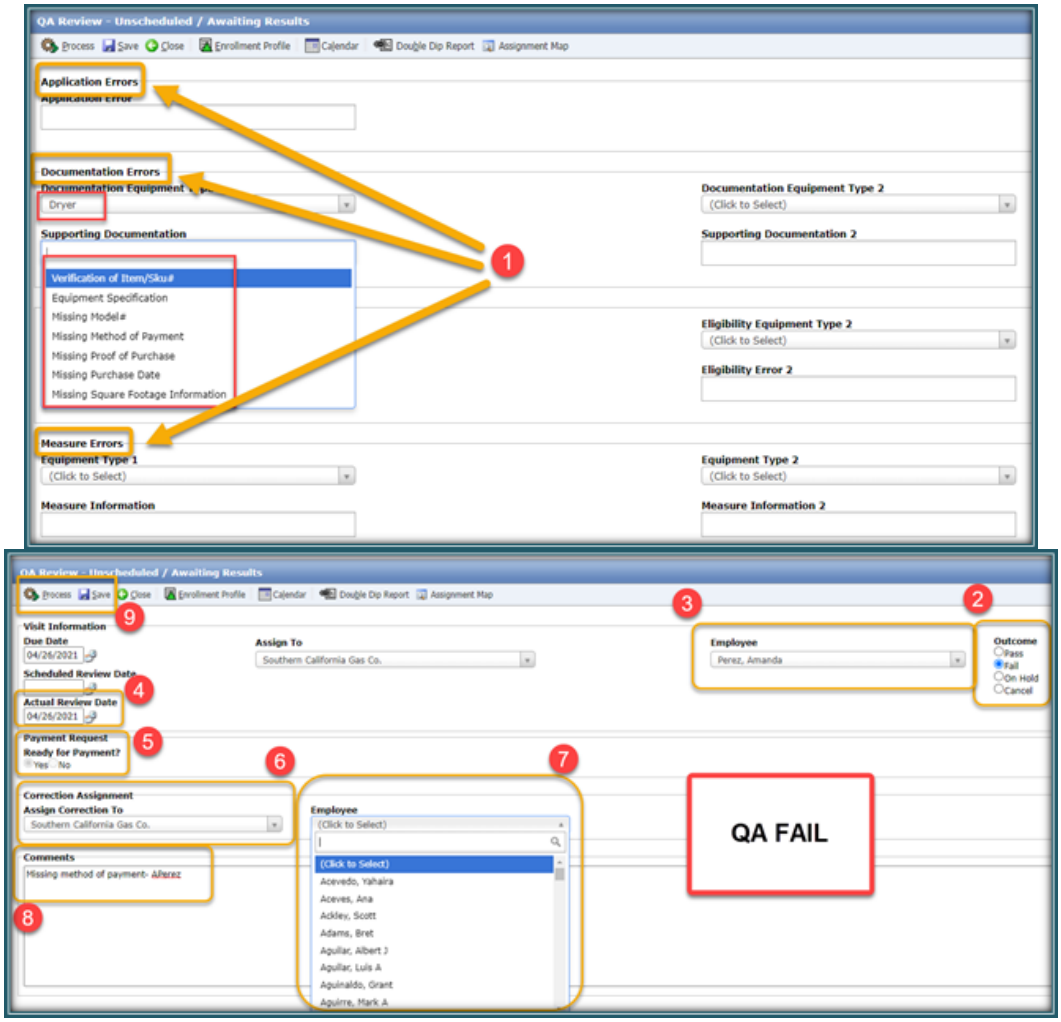




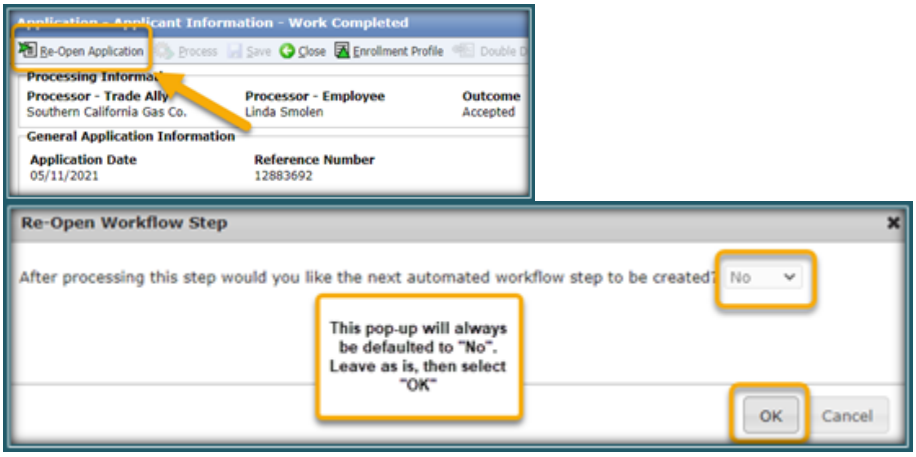
QA FAIL

10. If the enrollment has Failed QA Review and corrections are needed:

1) Select from the appropriate drop-down fields- **Application Error**, **Documentation Errors**, and **Measure Errors**
2) Select "Fail" under **Outcome**
3) Select your name from the **Employee** dropdown menu
4) Select today's date for the **Actual Review Date**
5) The **Ready for Payment** field will be defaulted to "No" when the **Outcome** is a "Fail"
6) Select "Southern California Gas Co." under the **Assign Correction To** field
7) Select the processor name under **Employee**
8) In the **Comments** field, add a brief note stating what corrections need to be made and enter your initials (QA Specialist).
9) Click "Save" and "Process"
10) Go back to the Enrollment Profile and ensure a "QA Correction" Workflow was generated. (*If Initiate Payment Workflow does not generate, please notify Processing/QA Team Leads)



**Note: When an enrollment is failed, the QA specialist will need to go the Application Workflow and Re-Open it so the processor can make the necessary corrections.



DNQ/INC – System Processed Enrollment

EECP's system tab scanner which verifies information on receipts has been deactivated effective the night of 09/15/2021. Due to this, applications which pass the double dip and eligibility will be processed by the system and either the Inspection or QA Review WF will populate.

QA Team will follow normal QA procedures to ensure documents and data entered match (Pass/Fail accordingly)

April Fernandez and Ashbey Garcia will be handling QA Corrections which were system completed. **Unless otherwise directed.**

Review scenarios below for new updates effective 09/15/2021:

Scenario 1 – Dates do not match, measure matches invoice/receipt, and measure qualifies.

- If dates do not match, however incentive is correct – QA **PASS.** QA will note "DD and model # verified. System completed and incentive correct." **QA will also add any necessary spec sheets due to no green check mark.**
- If dates do not match and incentive is incorrect – QA **FAIL** and assign to Ashbey Garcia **(or assigned processor)**
 - Processing Team will follow standard REEP Processing procedures and make changes as necessary.

Scenario 2 – Information entered does not match documentation (ie. Model number, measure…), but the measure qualifies.

- Follow normal QA procedures - **FAIL** and assign to Ashbey Garcia **(or assigned processor)**
 - Processing Team will follow standard REEP Processing procedures and make changes as necessary.

Scenario 3 – Customer does not qualify/incomplete application

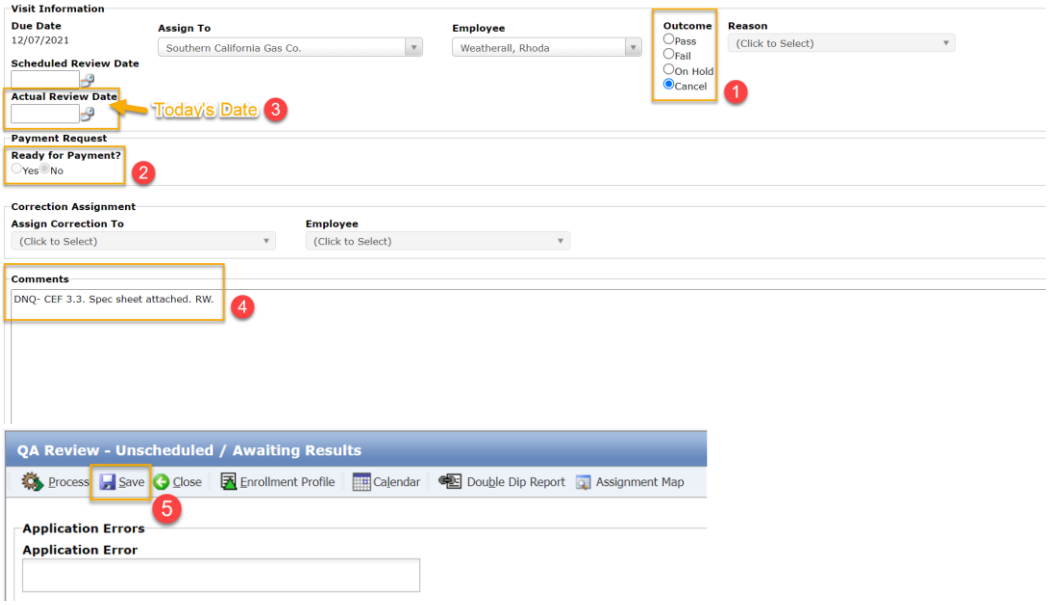
- QA Team will cancel enrollment
- QA Team will note reason on the enrollment.
 - DQ, system completed, (enter DNQ reason). Cancelled and email/letter sent.
 - INC, system completed, (enter INC reason). Cancelled and email/letter sent.
- QA Team will send corresponding email/letter DNQ or INC to the customer

DNQ/INC – How To Cancel An Enrollment

System processed enrollments will need to be cancelled due to INC or DNQ based on model specification, documentation, etc. When this happens, the enrollment MUST be canceled from the "Enrollment Profile" and NOT from the Application WF. Follow the steps below to properly cancel an enrollment:

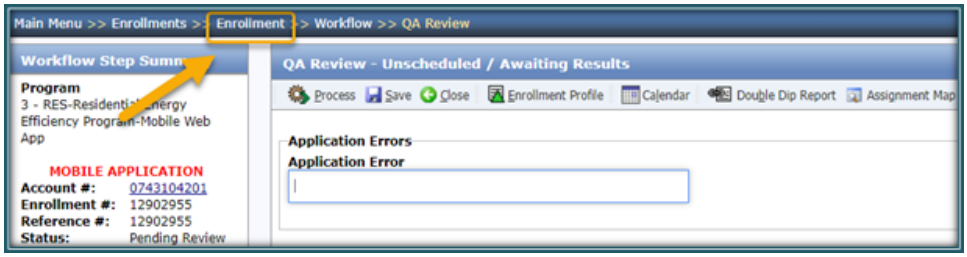
Step 1:

1) Select "Cancel" as the Outcome within the QA Review WF. **[Nexant will select "Fail"]**
2) Ready for Payment should remain as "No."
3) Enter today's date in the Actual Review Date.
4) In the comments section, notate the reason and any pertinent information why enrollment is being cancelled.
5) Click "Save."

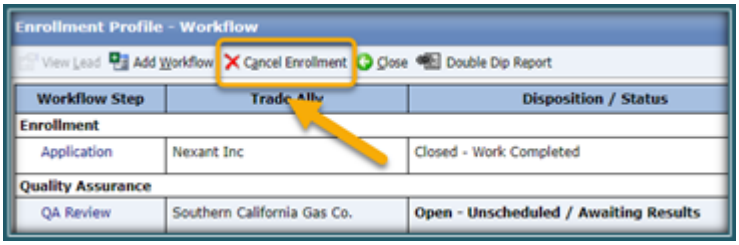


Step 2:

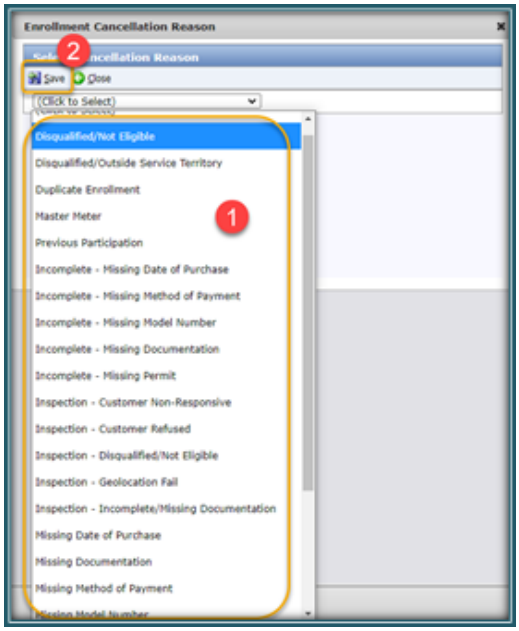
1) From the QA Review WF, click on "Enrollment" to go back to the Enrollment Profile
2) Attach any necessary documentation, ex. Spec sheet, item number look up, to show why it has been disqualified.



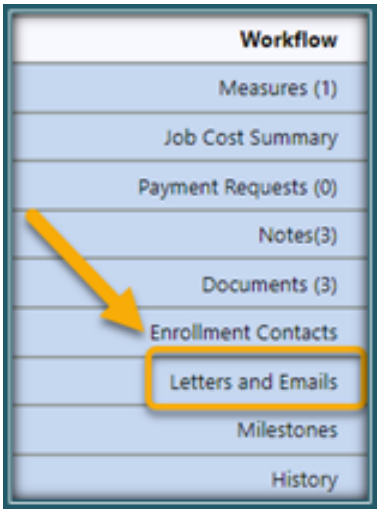
3) Select the cancellation reason from the drop-down menu and click "Save"



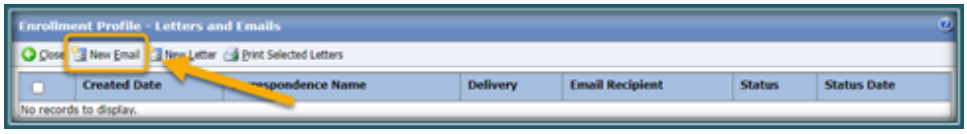
4) Select the cancellation reason from the drop-down menu and click "Save"



5) From the Enrollment Profile, open the “Letters and Emails tab



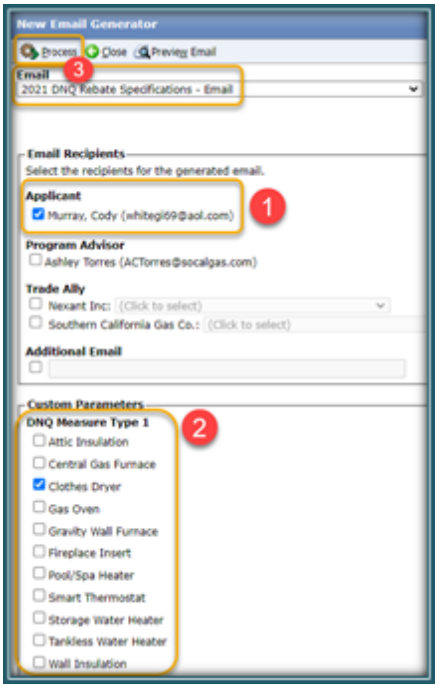
6) Click on “New Email”



7) Select the type of email to be sent from the “Email” drop-down menu. The most common selection would be the “2021 DNQ Rebate Specifications-Email"



8) Select the Applicant's email address and the measure type, then click "Process"



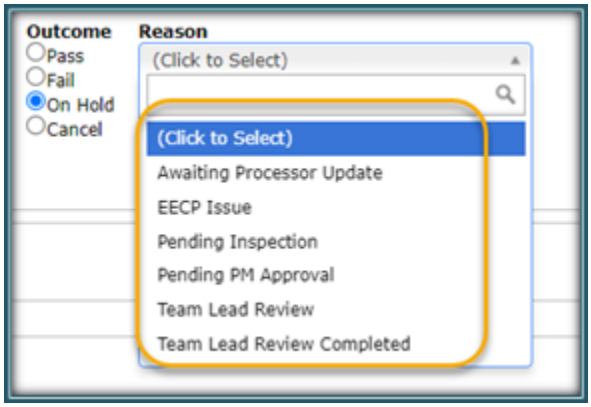
DNQ – Processor Processed Enrollment

There may be instances where an enrollment does not qualify (DNQ) based on model specifications, missing documentation, etc. When this happens, the enrollment will be sent back to the processor to DNQ and send email to reapply.

1) Process the QA Review WF as a "Fail" (see "QA Fail" section)

QA Review- On Hold Reasons

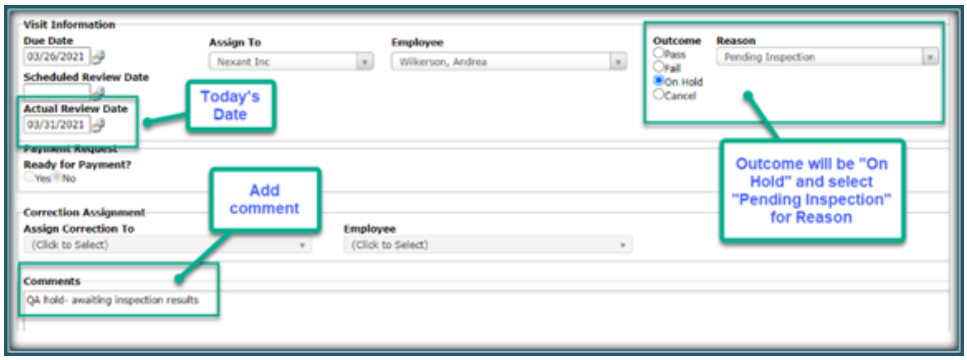
- The QA Review WF can be placed "On Hold" for several reasons. The three most common would be: Awaiting Processor Update, Pending Inspection and Team Lead (TL) Review.



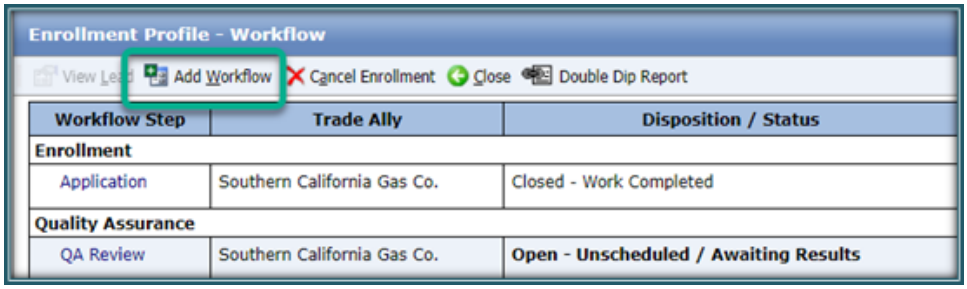
How to Add an Inspection WF

- An Inspection is required when the customer has applied for 2 or more of the same measure or upon TL/Supervisor/Program Manager (PM) requests. Follow the steps below.

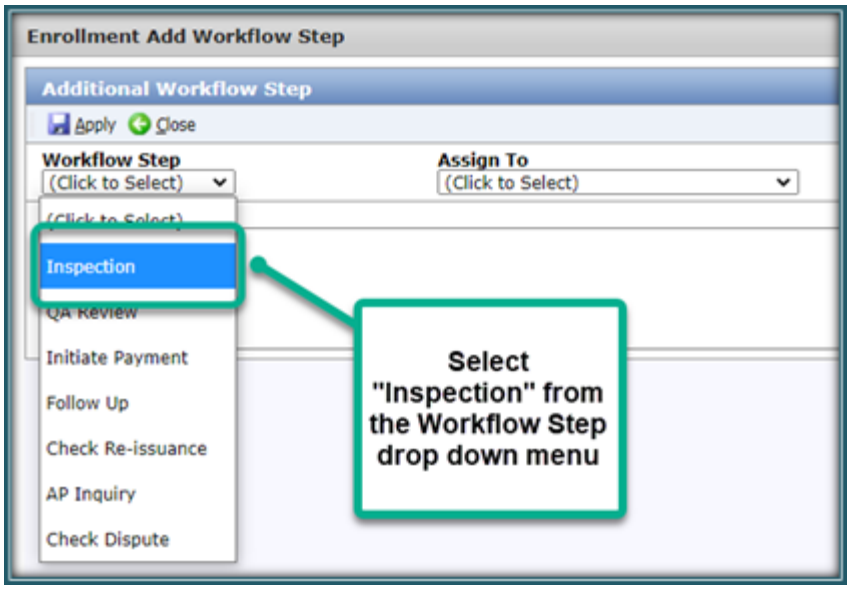
1) Place the QA WF "On Hold" with the Reason- **Pending Inspection**



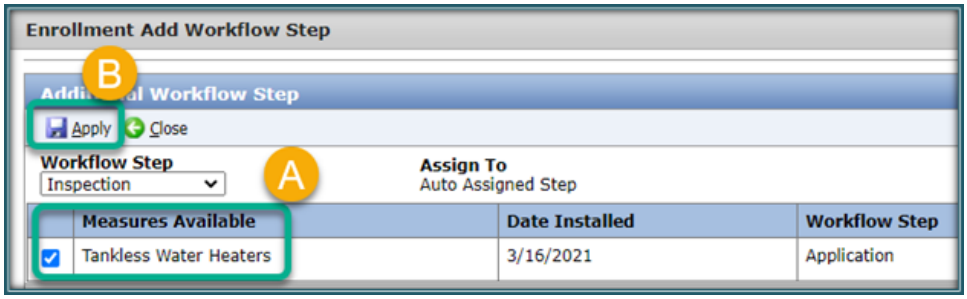
2) From the Enrollment Profile, click "Add Workflow"



3) Select "Inspection" from the "Workflow Step" drop-down menu.



4) **A-** Select all measures to be inspected; **B-** Then hit “Apply”. The Inspection WF will generate after the “Apply” button is selected.



Inspections

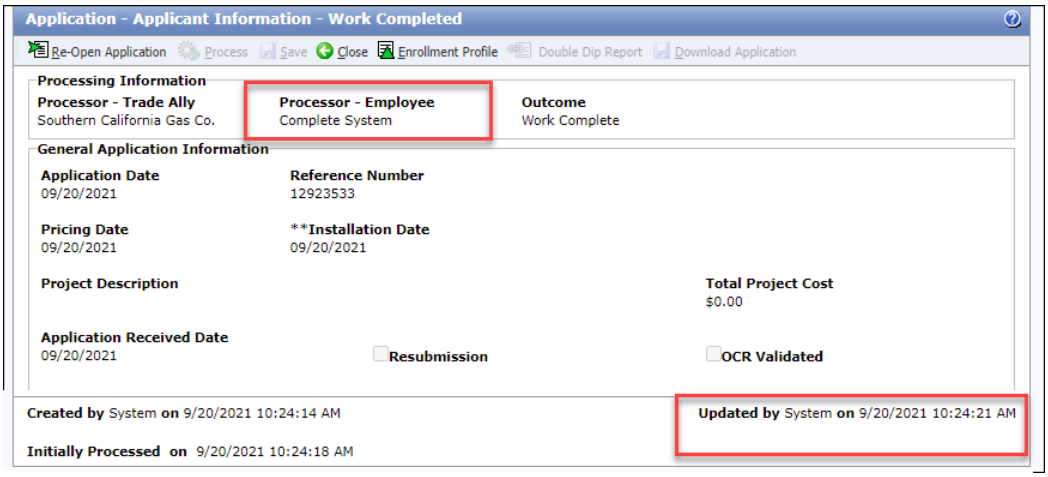
MEASURES

Inspections will be performed on randomly selected inspection work orders where energy efficient measures are installed. (5% inspection rate)

- Oven
- Storage Water Heaters
- Tankless Water Heaters
- Clothes Dryer
- Fireplace Insert
- Pool Heater
- Natural Gas Furnace

INSTRUCTIONS

In the Application Workflow under **Processor-Employee**, EECP will indicate whether the Application was processed by a processor identified by a processors name *or* by the customer and directly passed through to the next workflow identified as "**Complete-System**". Complete by system can also be identified at the bottom right of the Application workflow next to **Updated by**.



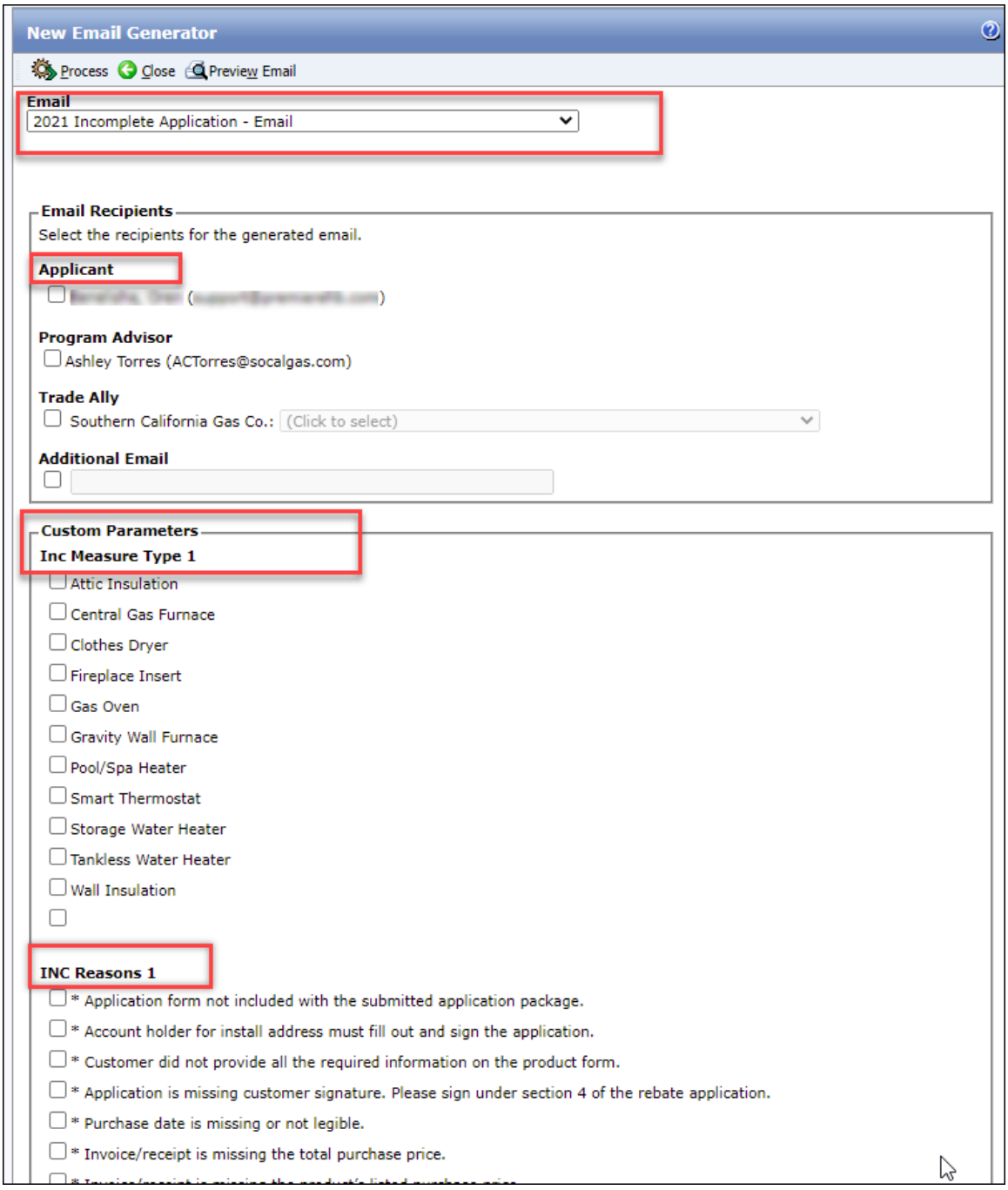
COMPLETE BY SYSTEM

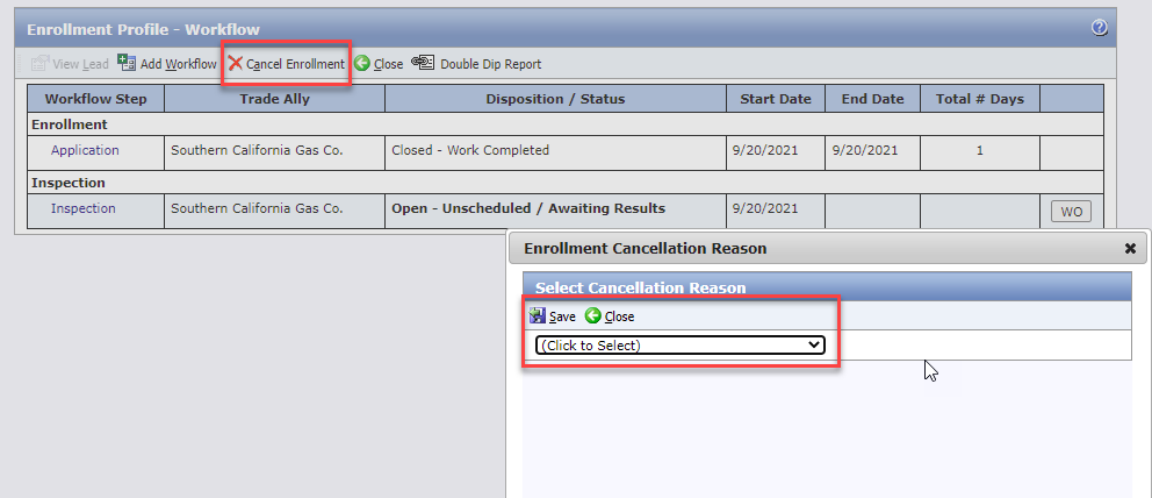
When the enrollment shows as "**Complete System**", verify Double Dip report and ensure all needed documentation is provided including receipts and geotagged photos. Model numbers and proof of payment must be listed on the receipt. Must also verify measures qualifies for incentive typically indicated by a green check mark. When the green check mark does not appear, you may need to verify Efficiency Ratings online and attach a supporting screen shot or spec sheet.

***Cancellations**: Incomplete* - When an enrollment is missing a receipt or required information on the receipt, the enrollment will be **Cancelled- Incomplete** on the Enrollment Profile and an email sent to the

customer by selecting making the appropriate selections in the **Letters and Emails tab** (Select **Email Type, Email Recipient, Measure and Reason**)

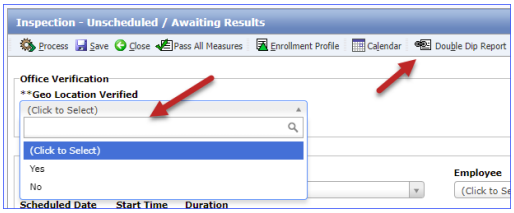
DQ - When measures do not qualify, then the enrollment will be DQ – Cancelled with an email sent to the customer using the appropriate selections similar to above.





COMPLETE BY PROCESSOR

Inspection Coordinator will verify Double Dip report and that geotagged images match the application/Install address. Once Verified, the inspection workflow may be passed by the Inspections Coordinator. Select “Yes” for Geo Location Verified.



- ✓ If photos are not geotagged or fail to match the application address, the inspection will be assigned to an SCG Inspector for a virtual inspection. Must provide the email address from the application workflow to the inspector which will be used in Vimotely. Geotagged photos submitted by the customer to the inspector may also be accepted.

When serial numbers do not match, the Inspection workflow will be updated with the serial number found during the inspection.

CASES FOR MANDATORY INSPECTION

ENROLLMENTS CANCELLED DUE TO UNRESPONSIVENESS AND REAPPLY

If an enrollment was chosen for inspection at random but was cancelled due to unresponsiveness and they reapplied. Their resubmission WILL be sent to inspection. Geo-tagged photos will be acceptable. The processor will notate the request and the resubmission with the original enrollment number.

RETURNED/CANCELLED ORDERS

The customer will be sent to inspection to verify equipment was installed. Processor will notate the reason as the "customers order was cancelled/returned sending to inspection to verify model #”

Geo-tagged photos of the model plate will be accepted. Inspector will confirm the date of the photo. Photo date should be from day they returned the item and forward as stated in cancelled/returned invoice (that is the date we go by) e.g. Invoice says item was returned on 11/22, geotagged photo is stamped 11/24 okay to accept.

Missing Installation Date on Mail in Application

The customer will be sent to inspection to verify equipment was installed. Geo-tagged photos will be acceptable. Processor will notate the reason as the "customer did not provide an install date on the application and no install date was found on the retailer invoice/receipt".

Passed

- ✓ Measure is new, installed and operational at the service address.
- ✓ Measure matches documented information on the work order, for example, the equipment type, quantities, model and serial numbers.

Failed

- ✓ CGI, no contact, or customer refusal. Measures are not installed at the address indicated on the application. The manufacturer, model and/or serial number does not match application

Initiate Payment

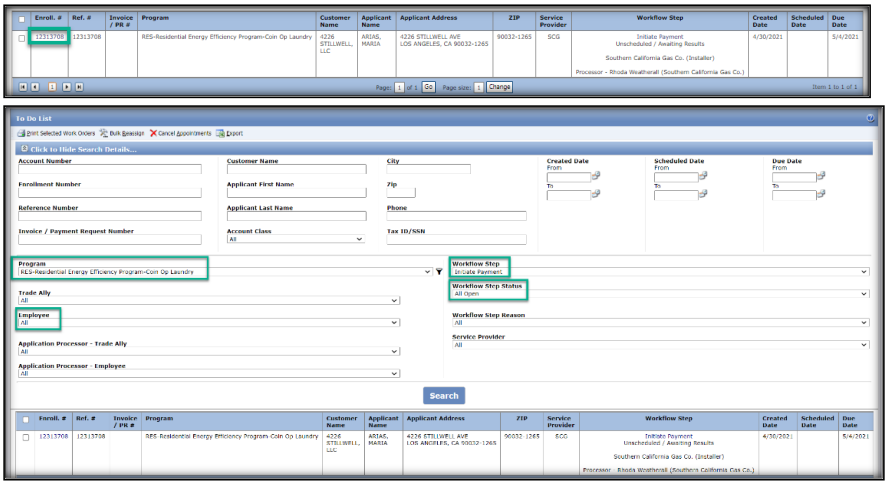
1. Payment Processor logs into EECP.



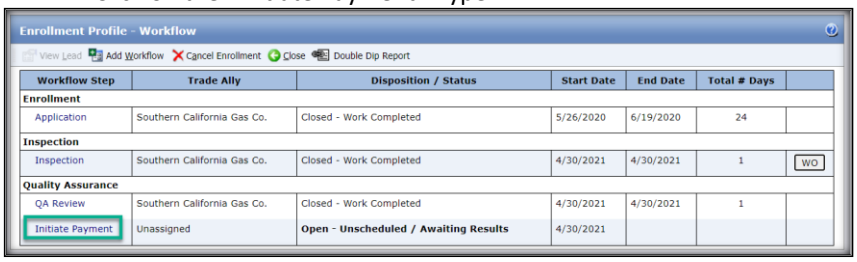
2. Search for Enrollment
 A. Main Menu>To Do List
 B. Apply the following filters if Application does not display.
 C. REEP
 D. Employee – All
 E. Workflow Step – Initiate Payment
 F. Workflow Step Status – All Open

3. Select Enrollment to review:

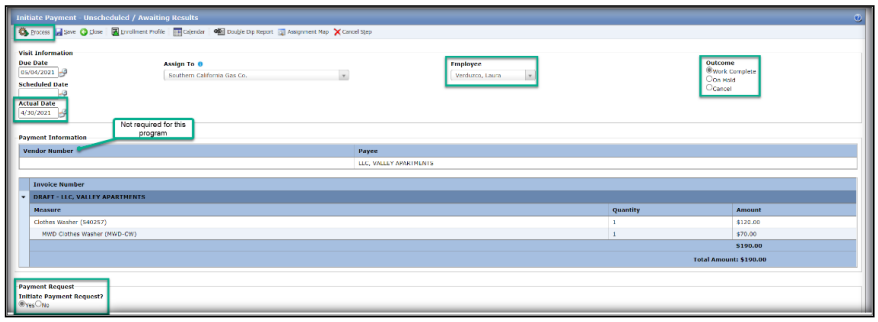
A. Click on the hyperlink in the “Enroll. #” column



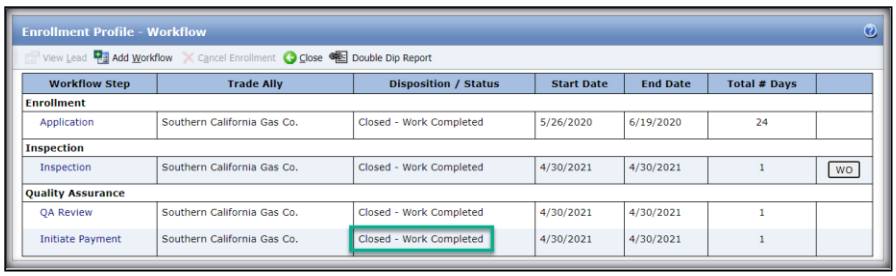
4. Open Initiate Payment workflow:
 A. Click on the “Initiate Payment” hyperlink



 B. Enter Actual Date – Date Completed Initiate Payment workflow
 C. Select “Employee” from drop down
 D. Outcome (Work Complete)
 E. Select “Yes” for Payment Request – “Initiate Payment Request”
 F. Click “Process”



5. Verify Enrollment Status is “Closed”



END OF PROCESS

Appendix

2022 Home Energy-Efficiency Rebate Program Application (Effective 01/01/22)

How To Apply – Page 1



2022 HOME ENERGY-EFFICIENCY REBATE PROGRAM APPLICATION

LET US HELP YOU SAVE ENERGY AND MONEY

SoCalGas offers a variety of rebates on natural gas products to help you save money and make your home more energy efficient. This application contains details on qualifying products, rebate amounts and how to apply.
It is simple and fast to apply for most rebates using our mobile application process.
Simply scan the QR code or go to socalgas.com/rebate-app to apply.

HOW TO APPLY

1. Read the terms and conditions included in this application package.
2. Qualifying product(s) must be purchased and installed between January 1, 2022 and December 31, 2022 to be eligible for a rebate. Do it yourself, or hire a licensed contractor for the installation. Please refer to the specification sheet product form for qualifying product requirements. Qualifying product(s) must be installed prior to submitting a rebate application and must be new. New construction homes do not qualify.
3. Mail a complete application that includes all of the following items:
 - ☐ **Completed form.** Please complete Sections 1-5. Customers must sign, print their name and date the application.
 - ☐ **A copy of a recent SoCalGas bill.**
 - ☐ **A copy of proof of permit closure (REQUIRED for furnace installations).** In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide proof of permit closure before rebate payment will be released for a natural gas furnace. Contractors must sign, date and provide the permit number in section 4. Customers are responsible for meeting all program requirements and/or homeowner's association requirements (if any) regarding location conditions, restriction codes, ordinances, rule and regulations covering installations.
 - ☐ **Paid receipt(s) or proof of purchase.** See proof of purchase requirements on page 2.
 - ☐ **Owners who purchased and installed measure in a rental home:** Proof of property ownership (property tax bill, deed, mortgage or homeowners insurance statement) is required when owner has purchased and installed measure in a rental home. Name and address shown on proof of property ownership must match install address listed on the application form.
 - ☐ **Manufactured/Mobile home customers:** If you live in a manufactured/mobile home that operates using a master meter (If you do not have an individual meter for your property), please have the SoCalGas account holder (e.g., park owner or property manager) fill out the customer information (section 2) and sign the application (section 4). Fill out section 3 if check needs to be paid to someone other than the account holder.

Applications must be postmarked February 15, 2023, or earlier, to be eligible for a rebate. ALL applications are processed on a first-come, first-served basis, upon receipt, until funds are depleted. INCOMPLETE and INCORRECT APPLICATIONS CANNOT BE PROCESSED. Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date.

1. Keep a copy of all mailed forms and required documents (including receipts and home improvement contracts) for your records.
2. Be prepared to participate in any required verification of installation(s). SoCalGas may verify the energy-efficient product(s), customer eligibility and installation prior to payment of rebate.
3. If all program requirements are met, a rebate check is generally mailed within six to eight weeks, unless your application is selected for verification, which may take additional time.

Mail the completed application packet to:
SoCalGas, 2022 Home Energy Efficiency Rebate Program, P.O. Box 512670, Los Angeles, CA 90051-0670

Page 1

PROOF OF PURCHASE REQUIREMENTS WITH TERMS & CONDITIONS – PAGE 2

PROOF OF PURCHASE REQUIREMENTS

While you may install some of the products yourself, some should be installed using a licensed contractor. The proof of purchase and other documentation required to process your rebate application may differ depending on who completes the installation. All products must be installed prior to submitting your completed forms and other required documentation.

Home improvement contract (HIC) and/or paid invoice/ receipts may be used as proof of purchase. The Contractors State License Board (CSLB) requires that licensed contractors provide you with an HIC if the materials and labor total for the product(s) and installation is $500 or more. It is recommended that you request an HIC from your contractor even if the contractor installation was less than $500. If an HIC is your proof of purchase, it must be the original given to you by your contractor and must be signed and dated by both you and your licensed contractor. If the signatures are not dated, the date that the HIC was written will determine the product purchase date.

Proof of Purchase must include the following information:

1. Retailer or contractor name, business address and phone.
2. Itemized description of each product, including such information as:
 - **a.** Manufacturer, product make and model number(s), and other identifying information.
 - **b.** Equipment-only cost.
 - **c.** Solar Uniform Energy Factor (SUEF) for solar thermal systems.
3. Invoice which includes purchase price per product, and notes "Paid in Full" or lists payment terms if applicable.
4. Product installation date, unless self-installed.
5. Cash on delivery (C.O.D.) will be accepted as proof of purchase provided C.O.D. invoice is accompanied by a delivery receipt, or an install date is noted on the invoice.

Altered receipts will not be accepted.

A product specification sheet is included in this application (page 5) to make sure your installed product meets the qualification requirements of the program.

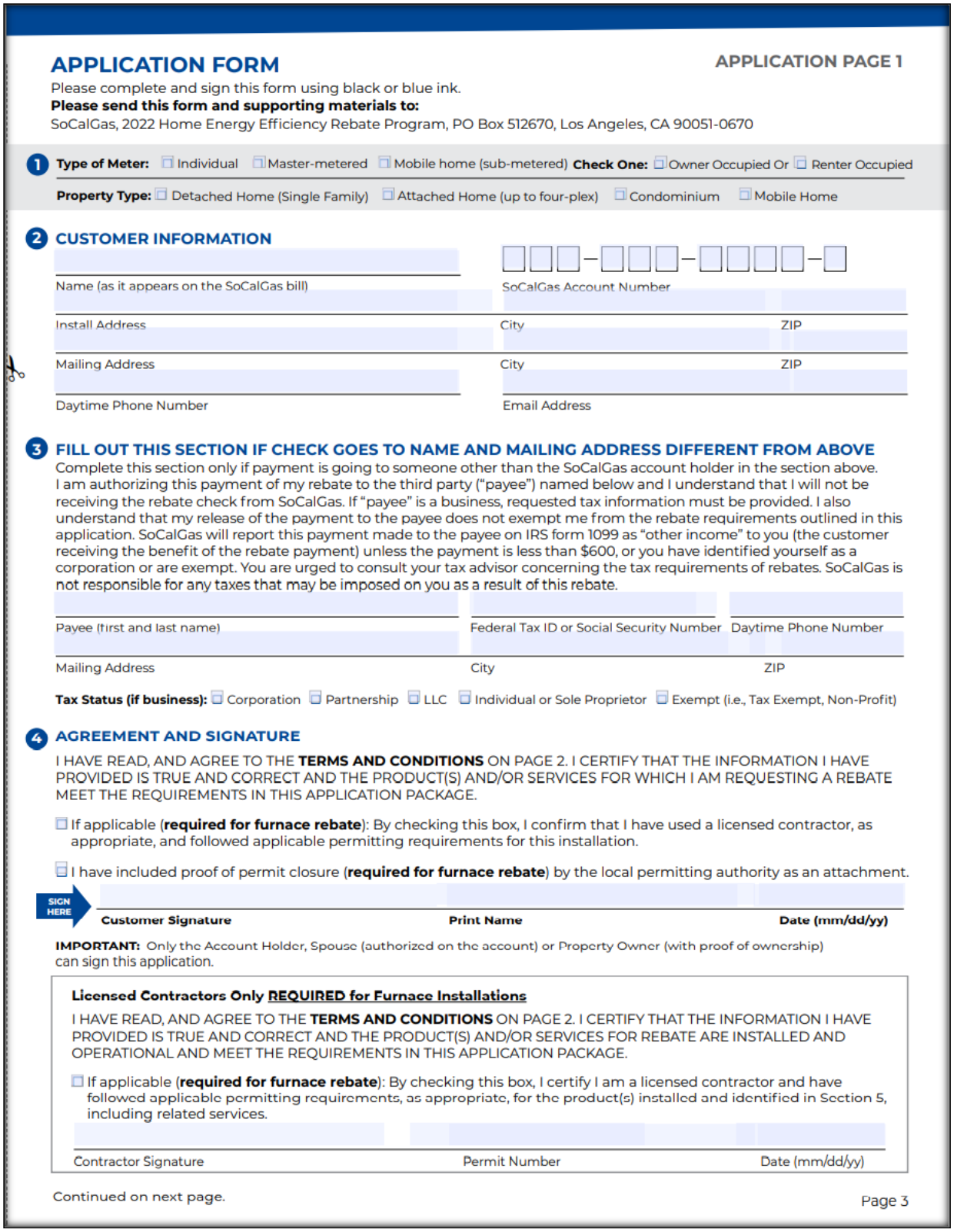
For additional information on home improvement contracts or the status of your contractor's license, visit **cslb.ca.gov** or call the CSLB at 1-800-321-CSLB (2752).

TERMS AND CONDITIONS

1. To be eligible for a rebate, I understand that: (a) I must be a residential customer on a residential rate with an active meter serviced by Southern California Gas Company (hereinafter referred to as, SoCalGas) for the installation address and, (b) the product(s) I have installed must qualify as described on the specification sheet incorporated herein by this reference and be designed to reduce my consumption of the energy distributed to me by SoCalGas at the installation address. I understand I must complete a separate application for each installation address for which I am requesting a rebate. All uses herein of the words "install", "installation" or similar phrases shall mean complete installation such that the subject products are fully functional.
2. I understand the rebate offer is limited to residential customers for residential use. The energy-efficient product(s) must be installed in a residential dwelling within SoCalGas' service area. The dwelling unit must be fully constructed and occupied.
3. I understand the program term is January 1, 2022 through December 31, 2022, and may end sooner if allocated funds are depleted. Product purchases and installations made prior to January 1, 2022 or after December 31, 2022 do not qualify for a rebate. Resale products, products leased, rebuilt, rented, refurbished, purchased at auction, received from warranty or insurance claims, won as a prize, received as a gift, purchased with rewards points, new parts installed in existing products do not qualify. Funds are limited. ALL applications are processed on a first-come, first-served basis, upon receipt, until funds are depleted. INCOMPLETE and INCORRECT APPLICATIONS CANNOT BE PROCESSED. Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date. The program may be modified or terminated without prior notice. In the event rebate amounts change during the program period, the order/purchase data and/or application postmark date will be used to determine product eligibility and rebate amount.
4. I understand that a signed and dated rebate application form, completed product form incorporated herein by this reference, all appropriate proof(s) of purchase, and other required documentation as referenced in this application package must be sent to SoCalGas' Processing Center postmarked by December 31, 2022 to be considered eligible for payment of a rebate. A rebate check for qualifying product(s) is generally mailed six to eight weeks after SoCalGas receives and approves a completed application, including all required documentation, unless an application is selected for a verification, which may add additional time.
5. I will allow, if requested, SoCalGas' and/or California Public Utilities Commission (CPUC) representative reasonable access to my home or through geolocation from pictures, video conferencing or onsite visits to verify the installed product I have purchased before a rebate is paid. I understand that a rebate will not be paid if I refuse to participate in any required verification. I understand that SoCalGas may contact the qualifying product vendor and/or installer, if needed, to verify purchase and/or installation and may provide my name and/or address to complete this verification.
6. I have installed qualifying product(s) and understand the energy-efficiency level of the qualifying product(s) (as defined in the specification sheet) determines the rebate amount. The rebate amount cannot exceed the purchase price. I understand that I cannot receive a rebate for the same product or equipment from more than one California investor-owned utility or third-party energy efficiency program offering rebates, financing or other incentives funded with CPUC Public Purpose Surcharge funds. **Products receiving a SoCalGas rebate at the point-of-sale, as an instant markdown, through a Regional Energy Network or Home Upgrade Program, or through a manufacturer/ distributor, do not qualify for a mail-in or online rebate.**
7. I agree that the selection of qualifying product(s), selection of manufacturer, dealer, supplier and/or installer, and purchase, installation and ownership/ maintenance of the qualifying product(s) referenced in this application package are my sole responsibility, and that the manufacturer, dealer, supplier or installer of these products and measures is not an agent or representative of SoCalGas. I understand that SoCalGas makes no representations regarding manufacturers, dealers, contractors, materials or workmanship. I ALSO UNDERSTAND THAT SOCALGAS MAKES NO WARRANTY, WHETHER EXPRESSED OR IMPLIED, INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR ANY PARTICULAR PURPOSE, USE, OR APPLICATION OF THE PRODUCTS OR MEASURES. I agree that SoCalGas has no liability whatsoever concerning (1) the quality, safety and/or installation of the products or measures, including their fitness for any purpose, (2) the estimated energy savings of the products or measures, (3) the workmanship of any third parties, (4) the installation of use of the products or measures including, but not limited to, effects on indoor pollutants, or (5) any other matter with respect to the 2022 Residential Rebate Program. I waive any and all claims against SoCalGas, its parent company, affiliate companies, directors, officers, employees, or agents, arising out of activities conducted by or on behalf of SoCalGas in connection with my application for any rebate(s) under the 2022 Residential Rebate Program. Without limiting the generality of the foregoing, none of such parties shall be liable hereunder for any type of damages, whether direct, indirect, incidental, consequential, exemplary, reliance, punitive, or special damages, including damages for loss of use, regardless of the form of action, whether in contract, indemnity, warranty, strict liability or tort, including negligence of any kind.
8. I am responsible for meeting all program requirements and complying with my state/county/ city governments, property owner and/or homeowner's association requirements (if any) in my area regarding local conditions, restrictions, codes, ordinances, rules and regulations covering this installation. In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide proof of permit closure before SoCalGas will release payment for any rebate or incentive for the purchase or installation of a natural gas furnace.
9. If a tenant, I am responsible for obtaining the property owner's permission to install the measure for which I am applying for a rebate. My signature on this application indicates I have obtained this permission.
10. I understand that SoCalGas is not responsible for items lost or destroyed in the mail/transit.

Page 2

APPLICATION FORM – PAGE 3



APPLICATION FORM

APPLICATION PAGE 1

Please complete and sign this form using black or blue ink.
Please send this form and supporting materials to:
SoCalGas, 2022 Home Energy Efficiency Rebate Program, PO Box 512670, Los Angeles, CA 90051-0670

1 **Type of Meter:** ☐ Individual ☐ Master-metered ☐ Mobile home (sub-metered) **Check One:** ☐ Owner Occupied Or ☐ Renter Occupied

Property Type: ☐ Detached Home (Single Family) ☐ Attached Home (up to four-plex) ☐ Condominium ☐ Mobile Home

2 CUSTOMER INFORMATION

Name (as it appears on the SoCalGas bill)

SoCalGas Account Number

Install Address | City | ZIP

Mailing Address | City | ZIP

Daytime Phone Number

Email Address

3 FILL OUT THIS SECTION IF CHECK GOES TO NAME AND MAILING ADDRESS DIFFERENT FROM ABOVE

Complete this section only if payment is going to someone other than the SoCalGas account holder in the section above. I am authorizing this payment of my rebate to the third party ("payee") named below and I understand that I will not be receiving the rebate check from SoCalGas. If "payee" is a business, requested tax information must be provided. I also understand that my release of the payment to the payee does not exempt me from the rebate requirements outlined in this application. SoCalGas will report this payment made to the payee on IRS form 1099 as "other income" to you (the customer receiving the benefit of the rebate payment) unless the payment is less than $600, or you have identified yourself as a corporation or are exempt. You are urged to consult your tax advisor concerning the tax requirements of rebates. SoCalGas is not responsible for any taxes that may be imposed on you as a result of this rebate.

Payee (first and last name) | Federal Tax ID or Social Security Number | Daytime Phone Number

Mailing Address | City | ZIP

Tax Status (if business): ☐ Corporation ☐ Partnership ☐ LLC ☐ Individual or Sole Proprietor ☐ Exempt (i.e., Tax Exempt, Non-Profit)

4 AGREEMENT AND SIGNATURE

I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR WHICH I AM REQUESTING A REBATE MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

☐ If applicable (**required for furnace rebate**): By checking this box, I confirm that I have used a licensed contractor, as appropriate, and followed applicable permitting requirements for this installation.

☐ I have included proof of permit closure (**required for furnace rebate**) by the local permitting authority as an attachment.

SIGN HERE

Customer Signature | **Print Name** | **Date (mm/dd/yy)**

IMPORTANT: Only the Account Holder, Spouse (authorized on the account) or Property Owner (with proof of ownership) can sign this application.

Licensed Contractors Only REQUIRED for Furnace Installations

I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR REBATE ARE INSTALLED AND OPERATIONAL AND MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

☐ If applicable (**required for furnace rebate**): By checking this box, I certify I am a licensed contractor and have followed applicable permitting requirements, as appropriate, for the product(s) installed and identified in Section 5, including related services.

Contractor Signature | Permit Number | Date (mm/dd/yy)

Continued on next page.

Page 3

PRODUCT REBATES – PAGE 4

5 PRODUCT REBATES

APPLICATION PAGE 2

Please provide all information requested on this form and include with submitted documents.
See PRODUCT SPECIFICATIONS for more details and limitations.

Product	Rebate Amount
A. ENERGY STAR® CERTIFIED CENTRAL NATURAL GAS FURNACES ☐ 92-94% AFUE – **$115 rebate** ☐ 95-96% AFUE – **$325 rebate** ☐ 97 AFUE or above – **$1,000 rebate** Date Installed _____ Date Purchased _____	$ _____
B. ENERGY STAR CERTIFIED NATURAL GAS CLOTHES DRYERS ☐ CEF – 3.48 or greater – **$70 rebate** Date Installed _____ Date Purchased _____	$ _____
C. NATURAL GAS FIREPLACE INSERT ☐ Tier I (70-74.9% FE) – **$300 rebate** ☐ Tier II (75% FE or greater) – **$500 rebate** Date Installed _____ Date Purchased _____ Manufacturer _____ Model # _____	$ _____
D. ENERGY-EFFICIENT RESIDENTIAL FREESTANDING NATURAL GAS OVENS A **$100 rebate** is available for the following energy-efficient units. Some eligible models include: Amana AGR6603SFB; Kenmore 227511361; Samsung NX58H56OOSS Frigidaire GCRG3060AFA; LG LRG3194ST; Whirlpool WFG510S0HS1 GE JGB635DEK3WW; Maytag MGR6600FZ1 Date Installed _____ Date Purchased _____ Model # _____ Visit **socalgas.com/rebates** for additional qualifying models.	$ _____
E. NATURAL GAS POOL HEATERS ☐ Tier I (84% - 89% TE) – **$400 rebate** ☐ Tier II (90% TE or above) – **$750 rebate** Date Installed _____ Date Purchased _____ Manufacturer Model #	$ _____
F. ENERGY STAR CERTIFIED NATURAL GAS STORAGE WATER HEATERS ☐ Up to 55 gallons – **$115 rebate** Date Installed _____ Date Purchased _____ Serial # _____ Model # _____	$ _____
G. ENERGY STAR CERTIFIED NATURAL GAS TANKLESS WATER HEATERS ☐ UEF of .82 – .86 – **$600 rebate** ☐ UEF of .87 – .94 – **$800 rebate** ☐ UEF of .95 or above – **$1,000 rebate** Date Installed _____ Date Purchased _____ Serial # _____ Model # _____	$ _____

Continued on next page.

CONTINUED PRODUCT REBATES AND PRODUCT SPECIFICATIONS – PAGE 5

Product	Rebate Amount
H. ENERGY STAR SOLAR THERMAL WATER HEATING SYSTEM Solar Water Heating Systems must have an SUEF of 1.8 or greater. ☐ ENERGY STAR Solar Thermal Water Heating System with an ENERGY STAR Storage Gas backup (up to 55 gallons) replacing a Storage Gas Water Heater – **$3,500 rebate** ☐ ENERGY STAR Solar Thermal Water Heating System with an ENERGY STAR Tankless Gas backup (.82 UEF or above) replacing a Storage Gas Water Heater – **$4,500 rebate** ☐ ENERGY STAR Solar Thermal Water Heating System with an ENERGY STAR Tankless Gas backup (.82 UEF or above) replacing a Tankless Gas Water Heater – **$4,500 rebate** **Solar Thermal Water Heating System Info:** Reservation #_____ Date Purchased _____ Date Installed_____ OG-300 Certification # _____ Collector Orientation & Slope (optional) _____ **New water heater info:** Date Purchased_____ Date Installed_____ Serial # _____ Model # _____	$ _____

PRODUCT SPECIFICATIONS

A. ENERGY STAR CERTIFIED CENTRAL NATURAL GAS FURNACES

Qualifying ENERGY STAR® natural gas furnaces must have a minimum Annual Fuel Utilization Efficiency (AFUE) of 92% to qualify for a rebate. Your C-20 contractor will be able to assist you in choosing the qualified equipment. Please visit **socalgas.com/hvacguide** for an important guide on heating, ventilation and air conditioning systems. Limit one per household.

B. ENERGY STAR CERTIFIED NATURAL GAS CLOTHES DRYERS

Qualifying ENERGY STAR natural gas clothes dryers must have a minimum Combined Energy Fator (CEF) of 3.48 or greater to qualify for a rebate. Limit one per household. List of qualifying products is available at **energystar.gov/products**.

C. NATURAL GAS FIREPLACE INSERT

Qualifying units must have electronic pilot ignition. Limit one per household. List of qualifying products is available at **socalgas.com/fireplace-insert-list**.

D. ENERGY-EFFICIENT RESIDENTIAL FREESTANDING NATURAL GAS OVENS

Must be replacing an existing natural gas oven. Limit one rebate per household.
For additional qualifying models, visit **socalgas.com/rebates**.

E. NATURAL GAS POOL HEATERS

Qualifying units must not exceed 500,000 British Thermal Unit (BTU). Must be replacing an existing natural gas pool heater. Limit one per household. List of qualifying products is available at **socalgas.com/pool-heater-list**.

F. ENERGY STAR CERTIFIED NATURAL GAS STORAGE WATER HEATERS

Qualifying ENERGY STAR Certified natural gas storage water heaters must be 55 gallons or less. Limit one per household. List of qualifying products is available at **energystar.gov/products**.

G. ENERGY STAR CERTIFIED NATURAL GAS TANKLESS WATER HEATERS

Qualifying tankless water heaters must be replacing a conventional tank-type water heater in a single family detached home. List of certified products is located at **energystar.gov/products**.

H. ENERGY STAR SOLAR THERMAL WATER HEATING SYSTEMS

A Solar Thermal Water Heating Reservation is required, prior to filling out a rebate application. This reservation is used to reserve funds for your rebate. Visit **socalgas.com/rebates** to access the reservation portal. You will need to enter your reservation # on the Product Rebates page. A certified Solar Thermal licensed contractor is recommended. For a current list of qualifying products, please visit **energystar.gov/products**.

IMPORTANT: In order to qualify for the rebate, Certified ENERGY STAR Solar Water Heating Systems must have a Solar Uniform Energy Factor (SUEF) of 1.8 or greater. In addition, a brand new installation of an ENERGY STAR Certified Natural Gas Storage Water Heater (up to 55 gallons) or an ENERGY STAR Certified Natural Gas Tankless Water Heater with a Uniform Energy Factor (UEF) of .82 or above (serving as the back up unit), in conjunction with the Solar installation is required. Limit one per household.

ENERGY-EFFICIENCY STARTER KIT & SOCAL GAS MARKETPLACE – PAGE 6

ENERGY-EFFICIENCY STARTER KIT*

☐ **Check here if you would like to receive a complimentary Energy-Efficiency Starter Kit.**

The kit includes three faucet aerators (one for your kitchen, two for bathrooms) and a low-flow showerhead. Low-flow showerheads and faucet aerators are great ways to save energy and water. These devices allow air to enter into the water stream, maintaining a high-pressure flow while reducing water usage.

Income-qualified customers may receive items in the kit plus additional no-cost home improvements through the Energy Savings Assistance Program[1]. More information on the Energy Savings Assistance Program can be found below.



*Program funds are allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. Offer limited to customers of SoCalGas. Limit one kit per residential customer per three-year period. Please allow 4-6 weeks for delivery of the energy efficiency starter kit. SoCalGas does not endorse or warrant, whether express or implied, any manufacturer's products and shall not be liable or responsible for claims arising out of or related to the purchase, installation, use or performance of any such products. This program is funded by California utility customers and administered by SoCalGas under the auspices of the California Public Utility Commission.

[1] **Energy Savings Assistance Program and California Alternate Rates for Energy (CARE) Program information**
Before starting your energy-efficiency project, did you know you may qualify for no-cost home improvements through the Energy Savings Assistance Program or get a 20 percent discount on your monthly energy bills through the CARE program? For more information, visit **socalgas.com/assistance** or call 1-800-331-7593 to learn about Energy Savings Assistance Program services and 1-800-427-2200 for CARE program details.

Energy Savings Assistance Program™

SOCALGAS MARKETPLACE

Shopping for your next energy-efficient appliance has never been easier. Browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates by visiting **marketplace.socalgas.com**

This is a third party website which is not part of the Southern California Gas Company. The Terms and Conditions and Privacy Policy on that website will apply.



NEED HELP? If you have any questions or need help filling out this application, please email **scgprocessing@socalgas.com** or call **888-431-2226** for assistance.

Please cut the form along the scissors marks ✂ and complete Application pages 1—3 inside.

Please send the completed application packet and supporting materials to:

SoCalGas
2022 Home Energy Efficiency Rebate Program
PO Box 512670,
Los Angeles, CA 90051-0670

Additional rebates from other utilities: Your local electric and water utilities may also offer energy-efficiency rebates. In some cases, they may be combined with rebates from SoCalGas for even greater savings.

This program is funded by California utility customers and administered by SoCalGas under the auspices of the California Public Utilities Commission. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until December 31, 2022 or until such funds are no longer available. This program may be modified or terminated without prior notice. The selection, purchase, and ownership of goods are the sole responsibility of customer. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods selected by customer.** Customers who choose to participate in this program not obligated to purchase any additional goods offered by manufacturer, vendor, service provider, or any other third party. Eligibility requirements apply; see the program conditions for details.

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2021 HOME ENERGY-EFFICIENCY REBATE PROGRAM APPLICATION (EFFECTIVE UNTIL 02/15/22)

HOW TO APPLY – PAGE 1

2021 HOME ENERGY-EFFICIENCY

REBATE PROGRAM APPLICATION



LET US HELP YOU SAVE ENERGY AND MONEY

SoCalGas® offers a variety of rebates on natural gas products to help you save money and make your home more energy efficient. This application contains details on qualifying products, rebate amounts and how to apply. For faster rebate processing you can also apply for most rebates online at **socalgas.com/rebates**.

HOW TO APPLY

1. Read the terms and conditions included in this application package.
2. Qualifying product(s) must be purchased and installed between January 1, 2021 and December 31, 2021 to be eligible for a rebate. Do it yourself, or hire a licensed contractor for the installation of energy-efficient qualifying product(s). Please refer to the specification sheet product form for qualifying product requirements. Qualifying product(s) must be installed prior to submitting a rebate application and must be new. New construction homes do not qualify.
3. Complete and mail this form including the following items:
 - ☐ **Completed form.** Please complete Sections 1-5.
 - ☐ **A copy of a recent SoCalGas® bill.** Proof of property ownership from owner, and a copy of a recent SoCalGas bill from the tenant are required when owner has purchased and installed measure in a rental home. Name and address shown on proof of property ownership must match name and install address listed on the application form, and address shown on SoCalGas bill must match the install address listed on the application form.
 - ☐ **A copy of proof of permit closure.** Proof of permit closure from the local Building Department or permitting authority is required. In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide proof of permit closure before SoCalGas will release payment for any rebate or incentive for the purchase or installation of a natural gas furnace. Name and address shown on proof of permit closure must match name and install address listed on the application form.
 - ☐ **Paid receipt(s) or proof of purchase.** See proof of purchase requirements on page 2.

Mail the completed application packet to:

SoCalGas
2021 Home Energy Efficiency Rebate Program
P.O. Box 512670
Los Angeles, CA 90051-0670

All submitted applications must be postmarked December 31, 2021, or earlier, to be eligible for a rebate. ALL applications are processed on a first-come, first-served basis, upon receipt, until funds are depleted. INCOMPLETE and INCORRECT APPLICATIONS CANNOT BE PROCESSED. Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date.

1. Keep a copy of all mailed forms and required documents (including receipts and home improvement contracts) for your records.
2. Be prepared to participate in any required verification of installation(s). SoCalGas may verify the energy-efficient product(s), customer eligibility and installation prior to payment of rebate.
3. If all program requirements are met, a rebate check is generally mailed within six to eight weeks, unless your application is selected for verification, which may take additional time.

Page 1

PROOF OF PURCHASE REQUIREMENTS WITH TERMS & CONDITIONS – PAGE 2

PROOF OF PURCHASE REQUIREMENTS

While you may install some of the products yourself, some should be installed using a licensed contractor. The proof of purchase and other documentation required to process your rebate application may differ depending on who completes the installation. All products must be installed prior to submitting your completed forms and other required documentation.

The following may be used as proof of purchase - home improvement contract (HIC) and/or paid invoice/receipts. The Contractors State License Board (CSLB) requires that licensed contractors provide you with an HIC if the materials and labor total for the product(s) and installation is $500 or more. It is recommended that you request an HIC from your contractor even if the contractor installation was less than $500. If an HIC is your proof of purchase, it must be the original given to you by your contractor and must be signed and dated by both you and your licensed contractor. If the signatures are not dated, the date that the HIC was written will determine the product purchase date.

Proof of Purchase must include at least the following information:

1. Retailer or contractor name, business address and phone.
2. Itemized description of each product, including such information as:
 - **a.** Manufacturer, product make and model number(s), and other identifying information.
 - **b.** Uniform Energy Factor (UEF) for natural gas water heaters.
 - **c.** Annual Fuel Utilization Efficiency (AFUE) for natural gas furnace.
 - **d.** Equipment-only cost.
3. Invoice which includes purchase price per product, and notes "Paid in Full" or lists payment terms if applicable.
4. Product installation date, unless self-installed.
5. Cash on delivery (C.O.D.) will be accepted as proof of purchase provided C.O.D. invoice is accompanied by a delivery receipt, or an install date is noted on the invoice.

Altered receipts will not be accepted.

A product specification sheet is included in this application (page 5) to make sure your installed product meets the qualification requirements of the program.

For additional information on home improvement contracts or the status of your contractor's license, visit **cslb.ca.gov** or call the Contractors State License Board at 1-800-321-CSLB (2752).

TERMS AND CONDITIONS

1. To be eligible for a rebate, I understand that: (a) I must be a residential customer on a residential rate with an active meter serviced by SoCalGas for the installation address and, (b) the product(s) I have installed must qualify as described on the specification sheet incorporated herein by this reference and be designed to reduce my consumption of the energy distributed to me by SoCalGas at the installation address. I understand I must complete a separate application for each installation address for which I am requesting a rebate. All uses herein of the words "install", "installation" or similar phrases shall mean complete installation such that the subject products are fully functional.
2. I understand the rebate offer is limited to residential customers for residential use. The energy-efficient product(s) must be installed in a residential dwelling within SoCalGas' service area. The dwelling unit must be fully constructed and occupied.
3. I understand the program term is January 1, 2021 through December 31, 2021, and may end sooner if allocated funds are depleted. Product purchases and installations made prior to January 1, 2021 or after December 31, 2021 do not qualify for a rebate. Resale products, products leased, rebuilt, rented, refurbished, purchased at auction, received from warranty or insurance claims, won as a prize, received as a gift, purchased with rewards points, new parts installed in existing products do not qualify. Funds are limited. ALL applications are processed on a first-come, first-served basis, upon receipt, until funds are depleted. INCOMPLETE and INCORRECT APPLICATIONS CANNOT BE PROCESSED. Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date. The program may be modified or terminated without prior notice. In the event rebate amounts change during the program period, the order/purchase data and/or application postmark date will be used to determine product eligibility and rebate amount.
4. I understand that a signed and dated rebate application form, completed product form incorporated herein by this reference, all appropriate proof(s) of purchase, and other required documentation as referenced in this application package must be sent to SoCalGas' Processing Center postmarked by December 31, 2021 to be considered eligible for payment of a rebate. A rebate check for qualifying product(s) is generally mailed six to eight weeks after SoCalGas receives and approves a completed application, including all required documentation, unless an application is selected for a verification, which may add additional time.
5. I will allow, if requested, SoCalGas' and/or California Public Utilities Commission (CPUC) representative reasonable access to my home or through geolocation from pictures, video conferencing or onsite visits to verify the installed product I have purchased before a rebate is paid. I understand that a rebate will not be paid if I refuse to participate in any required verification. I understand that SoCalGas may contact the qualifying product vendor and/or installer, if needed, to verify purchase and/or installation and may provide my name and/or address to complete this verification.
6. I have installed qualifying product(s) and understand the energy-efficiency level of the qualifying product(s) (as defined in the specification sheet) determines the rebate amount. The rebate amount cannot exceed the purchase price. I understand that I cannot receive a rebate for the same product or equipment from more than one California investor-owned utility or third-party energy efficiency program offering rebates, financing or other incentives funded with CPUC Public Purpose Surcharge funds. **Products receiving a SoCalGas rebate at the point-of-sale, as an instant markdown, through a Regional Energy Network or Home Upgrade Program, or through a manufacturer/distributor, do not qualify for a mail-in or online rebate.**
7. I agree that the selection of qualifying product(s), selection of manufacturer, dealer, supplier and/or installer, and purchase, installation and ownership/ maintenance of the qualifying product(s) referenced in this application package are my sole responsibility, and that my manufacturer, dealer, supplier or installer of these products and measures is not an agent or representative of SoCalGas. I understand that SoCalGas makes no representations regarding manufacturers, dealers, contractors, materials or workmanship. I ALSO UNDERSTAND THAT SOCALGAS MAKES NO WARRANTY, WHETHER EXPRESSED OR IMPLIED, INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR ANY PARTICULAR PURPOSE, USE, OR APPLICATION OF THE PRODUCTS OR MEASURES. I agree that SoCalGas has no liability whatsoever concerning (1) the quality, safety and/or installation of the products or measures, including their fitness for any purpose, (2) the estimated energy savings of the products or measures, (3) the workmanship of any third parties, (4) the installation of use of the products or measures including, but not limited to, effects on indoor pollutants, or (5) any other matter with respect to the 2021 Residential Rebate Program. I waive any and all claims against SoCalGas, its parent company, affiliate companies, directors, officers, employees, or agents, arising out of activities conducted by or on behalf of SoCalGas in connection with my application for any rebate(s) under the 2021 Residential Rebate Program. Without limiting the generality of the foregoing, none of such parties shall be liable hereunder for any type of damages, whether direct, indirect, incidental, consequential, exemplary, reliance, punitive, or special damages, including damages for loss of use, regardless of the form of action, whether in contract, indemnity, warranty, strict liability or tort, including negligence of any kind.
8. I am responsible for meeting all program requirements and complying with my state/county/ city governments, property owner and/or homeowner's association requirements (if any) in my area regarding local conditions, restrictions, codes, ordinances, rules and regulations covering this installation. In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide proof of permit closure before SoCalGas will release payment for any rebate or incentive for the purchase or installation of a natural gas furnace.
9. If a tenant, I am responsible for obtaining the property owner's permission to install the measure for which I am applying for a rebate. My signature on this application indicates I have obtained this permission.
10. I understand that SoCalGas is not responsible for items lost or destroyed in the mail/transit.

Page 2

APPLICATION FORM – PAGE 3

APPLICATION FORM

Please complete and sign this form using black or blue ink.

1 **Metering Status:** ☐ Individual ☐ Master-metered ☐ Mobile home (sub-metered) **Check One:** ☐ Owner Occupied Or ☐ Renter Occupied

Property Type: ☐ Detached Home (Single Family) ☐ Attached Home (up to four-plex) ☐ Condominium ☐ Mobile Home

2 CUSTOMER INFORMATION

Name (as it appears on your bill)

☐☐☐-☐☐☐-☐☐☐☐-☐ SoCalGas Account Number

Install Address | City | ZIP

Mailing Address | City | ZIP

Daytime Phone Number | Email Address

3 FILL OUT THIS SECTION IF CHECK GOES TO NAME AND MAILING ADDRESS DIFFERENT FROM ABOVE

Complete this section only if payment is going to someone other than the SoCalGas account holder in the section above. I am authorizing this payment of my rebate to the third party ("payee") named below and I understand that I will not be receiving the rebate check from SoCalGas. If "payee" is a business, requested tax information must be provided. I also understand that my release of the payment to the payee does not exempt me from the rebate requirements outlined in this application. SoCalGas will report this payment made to the payee on IRS form 1099 as "other income" to you (the customer receiving the benefit of the rebate payment) unless the payment is less than $600, or you have identified yourself as a corporation or are exempt. You are urged to consult your tax advisor concerning the tax requirements of rebates. SoCalGas is not responsible for any taxes that may be imposed on you as a result of this rebate.

Payee (first and last name) | Federal Tax ID or Social Security Number

Mailing Address | City | ZIP

Tax Status (if business): ☐ Corporation ☐ Partnership ☐ LLC ☐ Individual or Sole Proprietor ☐ Exempt (i.e., Tax Exempt, Non-Profit)

4 AGREEMENT AND SIGNATURE

Licensed Contractors Only

I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR REBATE ARE INSTALLED AND OPERATIONAL AND MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

☐ If applicable: By checking this box, I certify I am a licensed contractor and have followed applicable permitting requirements, as appropriate, for this HVAC installation or replacement.

Contractor Signature | Permit Number | Date (mm/dd/yy)

I HAVE READ, AND AGREE TO THE **TERMS AND CONDITIONS** ON PAGE 2. I CERTIFY THAT THE INFORMATION I HAVE PROVIDED IS TRUE AND CORRECT AND THE PRODUCT(S) AND/OR SERVICES FOR WHICH I AM REQUESTING A REBATE MEET THE REQUIREMENTS IN THIS APPLICATION PACKAGE.

☐ If applicable: By checking this box, I confirm that I have used a licensed contractor, as appropriate, and followed applicable permitting requirements for this installation.

☐ I have included proof of permit closure by the local permitting authority as an attachment.

Customer Signature | Print Name | Date (mm/dd/yy)

Please send this form and supporting materials to: SoCalGas, 2021 Home Energy Efficiency Rebate Program, PO Box 512670, Los Angeles, CA 90051-0670

Continued on next page.

PRODUCT REBATES – PAGE 4

APPLICATION PAGE 2

5 PRODUCT REBATES

Please complete, sign and include this product form with submitted documents. Provide all the information requested on this rebate form. See PRODUCT SPECIFICATIONS for more details and limitations.

Product	Rebate Amount
A. ENERGY STAR® CERTIFIED CENTRAL NATURAL GAS FURNACES ☐ 92-94 percent Annual Fuel Utilization Efficiency (AFUE) receive a **$115 rebate** ☐ 95-96 percent AFUE receive a **$325 rebate** ☐ 97 AFUE or above receive a **$1,000 rebate** Date Installed _____ Date Purchased _____	$ _____
B. ENERGY STAR® CERTIFIED NATURAL GAS CLOTHES DRYERS ☐ Combined Energy Factor (CEF) - 3.48 or greater - **$70 rebate** Date Installed _____ Date Purchased _____	$ _____
C. NATURAL GAS FIREPLACE INSERT ☐ Tier I (70-74.9% FE) - **$300 rebate** ☐ Tier II (75% FE or greater) - **$500 rebate** Date Installed _____ Date Purchased _____ Manufacturer _____ Model Number _____	$ _____
D. ENERGY-EFFICIENT RESIDENTIAL FREESTANDING NATURAL GAS OVENS A **$100 rebate** is available for the following energy efficient units. Eligible models include: **Samsung NX58H5600SS** **Whirlpool WFG510S0HS1** **GE JGB635DEK3WW** **Maytag MGR6600FZ1** **Frigidaire GCRG3060AFA** Date Installed _____ Date Purchased _____ Retailer _____ Model Number _____	$ _____
E. NATURAL GAS POOL HEATERS ☐ Tier I - Thermal Efficiency (84% - 89% TE) - **$400 rebate** ☐ Tier II - Thermal Efficiency (90% TE or above) - **$750 rebate** Date Installed _____ Date Purchased _____ Manufacturer _____ Model Number _____	$ _____
F. ENERGY STAR® CERTIFIED NATURAL GAS STORAGE WATER HEATERS ☐ Up to 55 gallons - **$115 rebate** Date Installed _____ Date Purchased _____ Serial No. _____	$ _____
G. ENERGY STAR® CERTIFIED NATURAL GAS TANKLESS WATER HEATERS ☐ Uniform Energy Factor (UEF) of .82 - .86 receive a **$600 rebate** ☐ Uniform Energy Factor (UEF) of . 87 - .94 receive a **$800 rebate** ☐ Uniform Energy Factor (UEF) of .95 or above receive a **$1,000 rebate** Date Installed _____ Date Purchased _____ Serial No. _____	$ _____

TOTAL REBATE AMOUNT $ _____

Continued on next page.

PRODUCT SPECIFICATIONS – PAGE 5

PRODUCT SPECIFICATIONS

A. ENERGY STAR® CERTIFIED CENTRAL NATURAL GAS FURNACES

Your C-20 contractor will be able to assist you in choosing the qualified equipment. Make, model number and AFUE must be included with a copy of your receipt. Limit one per individual residence.

IMPORTANT: You must check the box above the signature line along with the permit number and contractor signature, if applicable, to receive the rebate. **See Application page 1.** In accordance with California Public Utilities Code section 399.4(b), the customer (or their contractor) must provide proof of permit closure before SoCalGas will release payment for any rebate or incentive for the purchase or installation of a natural gas furnace.

Please visit **socalgas.com/hvacguide** for an important guide on heating ventilation and air conditioning systems.

B. ENERGY STAR® CERTIFIED NATURAL GAS CLOTHES DRYERS

Qualifying ENERGY STAR® Natural Gas clothes dryers purchased and installed will be eligible for a $70 rebate. Limit one per individual residence. List of qualifying products is available at **energystar.gov/products**.

C. NATURAL GAS FIREPLACE INSERT

Qualifying units must have electronic pilot ignition. Limit one per household. List of qualifying products is available at **socalgas.com/fireplace-insert-list**.

D. ENERGY-EFFICIENT RESIDENTIAL FREESTANDING NATURAL GAS OVENS

Must be replacing an existing natural gas oven. Limit one rebate per household.
Visit **socalgas.com/rebates** for additional qualifying models.

E. NATURAL GAS POOL HEATERS

The newly purchased natural gas pool heater must replace an existing natural gas pool heater. Limit one per household. List of qualifying products is available at **socalgas.com/pool-heater-list**.

F. ENERGY STAR® CERTIFIED NATURAL GAS STORAGE WATER HEATERS

Make and model number must be included with a copy of your receipt. Qualifying ENERGY STAR Certified natural gas storage water heaters must be 55 gallons or less. Limit one per individual residence. List of qualifying products is available at **energystar.gov/products**.

G. ENERGY STAR® CERTIFIED NATURAL GAS TANKLESS WATER HEATERS

Qualifying tankless water heaters must be replacing a conventional tank-type water heater in a single family detached home. Limit one per household. List of certified products is located at **energystar.gov/products**.







ENERGY-EFFICIENCY STARTER KIT – PAGE 6

ENERGY-EFFICIENCY STARTER KIT*

☐ Check here if you would like to receive a complimentary Energy-Efficiency Starter Kit.

The kit includes three faucet aerators (one for your kitchen, two for bathrooms) and a low-flow showerhead. Low-flow showerheads and faucet aerators are great ways to save energy and water. These devices allow air to enter into the water stream, maintaining a high-pressure flow while reducing water usage.

Income-qualified customers may receive items in the kit plus additional no-cost home improvements through the Energy Savings Assistance Program[1]. More information on the Energy Savings Assistance Program can be found below.



*Program funds are allocated on a first-come, first-served basis until such funds are no longer available. This program may be modified or terminated without prior notice. Offer limited to customers of Southern California Gas Company. Limit one kit per residential customer per three-year period. Please allow 4-6 weeks for delivery of the energy efficiency starter kit. Southern California Gas Company does not endorse or warrant, whether express or implied, any manufacturer's products and shall not be liable or responsible for claims arising out of or related to the purchase, installation, use or performance of any such products. This program is funded by California utility customers and administered by Southern California Gas Company under the auspices of the California Public Utility Commission.

1. **Energy Savings Assistance Program and California Alternate Rates for Energy (CARE) Program information**
Before starting your energy-efficiency project, did you know you may qualify for no-cost home improvements through the Energy Savings Assistance Program or get a 20 percent discount on your monthly energy bills through the CARE program? For more information, visit **socalgas.com/assistance** or call 1-800-331-7593 to learn about Energy Savings Assistance Program services and 1-800-427-2200 for CARE program details.

Energy Savings Assistance Program™

Please cut the form along the scissors marks and complete Application pages 1–3 inside.

Please send the completed application packet and supporting materials to:

SoCalGas
2021 Home Energy Efficiency Rebate Program
PO Box 512670,
Los Angeles, CA 90051-0670

Additional rebates from other utilities: Your local electric and water utilities may also offer energy-efficiency rebates. In some cases, they may be combined with rebates from SoCalGas for even greater savings.

This program is funded by California utility customers and administered by Southern California Gas Company under the auspices of the California Public Utilities Commission. Program funds, including any funds utilized for rebates or incentives, will be allocated on a first-come, first-served basis until December 31, 2021 or until such funds are no longer available. This program may be modified or terminated without prior notice. The selection, purchase, and ownership of goods are the sole responsibility of customer. **SoCalGas makes no warranty, whether express or implied, including the warranty of merchantability or fitness for a particular purpose, of goods selected by customer.** Customers who choose to participate in this program not obligated to purchase any additional goods offered by manufacturer, vendor, service provider, or any other third party. Eligibility requirements apply; see the program conditions for details.

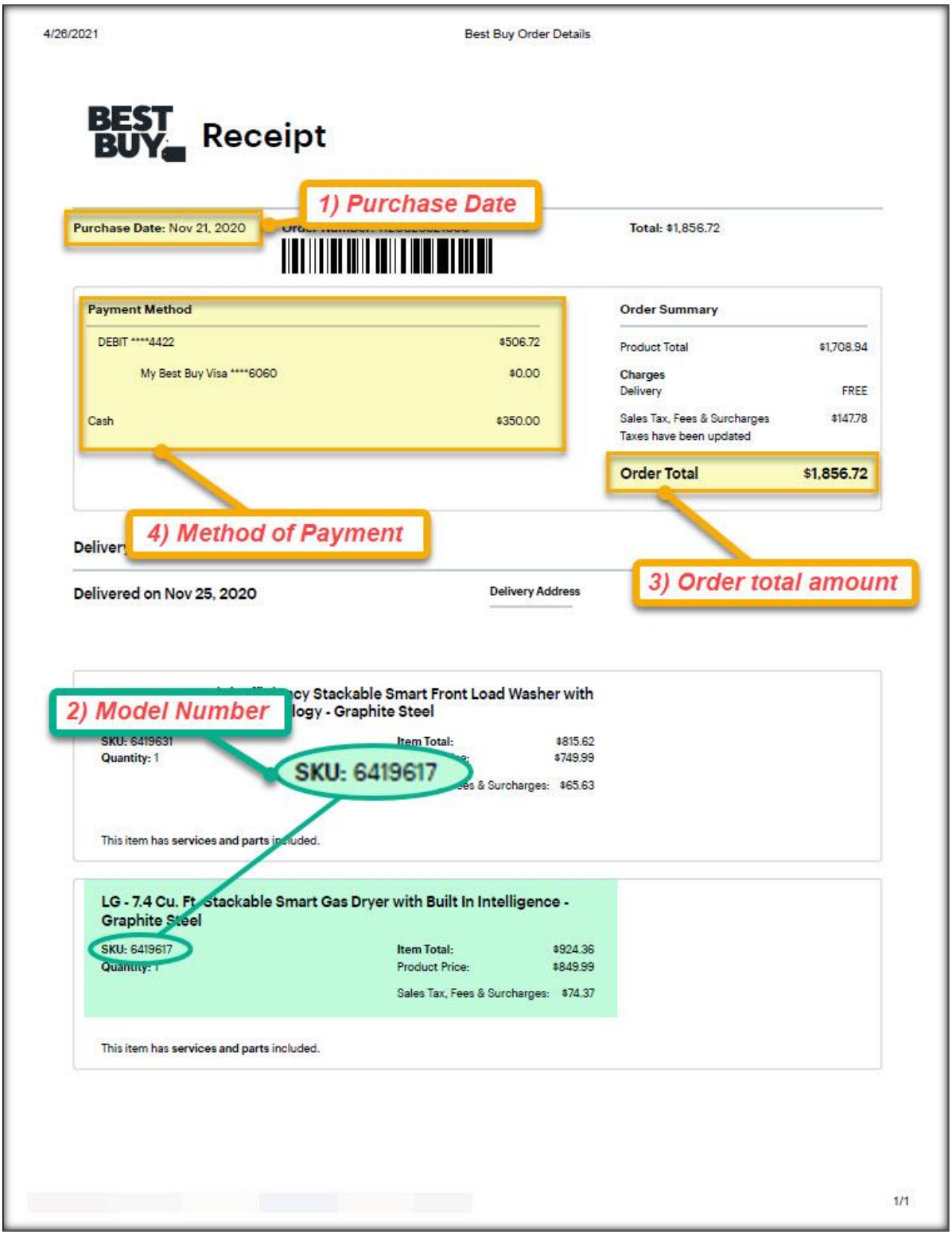
© 2021 Southern California Gas Company. Trademarks are property of their respective owners. All rights reserved.

N21H148A 0621

Page 6

EXAMPLES OF ACCEPTABLE RECEIPTS AND INVOICES

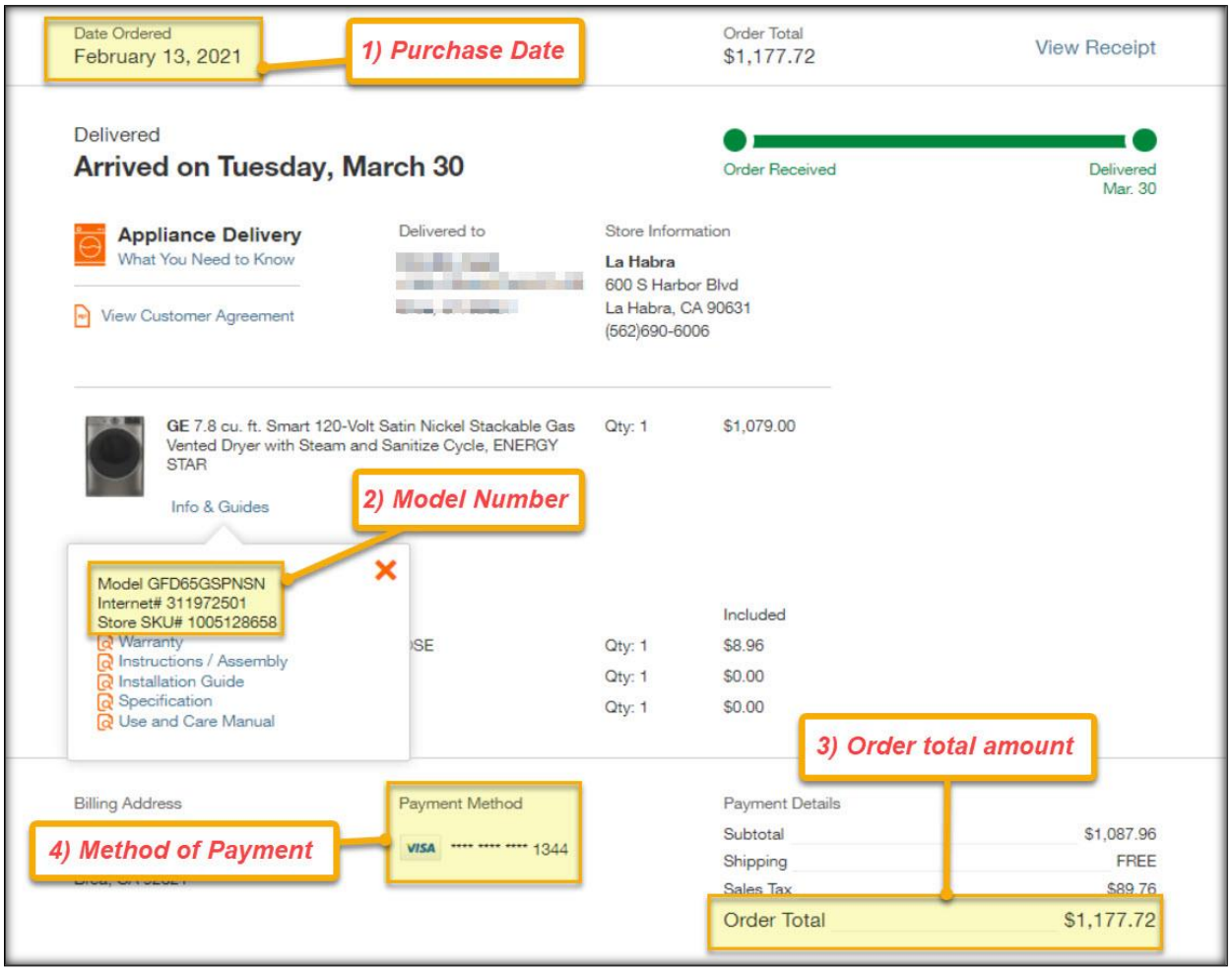
BEST BUY 1 – SKU # INSTEAD OF MODEL #, PURCHASE DATE, METHOD OF PAYMENT, ORDER TOTAL AMOUNT PROVIDED, RETAILER



BEST BUY 2 – MODEL #, PURCHASE DATE, ORDER TOTAL AMOUNT, AND METHOD OF PAYMENT INCLUDED



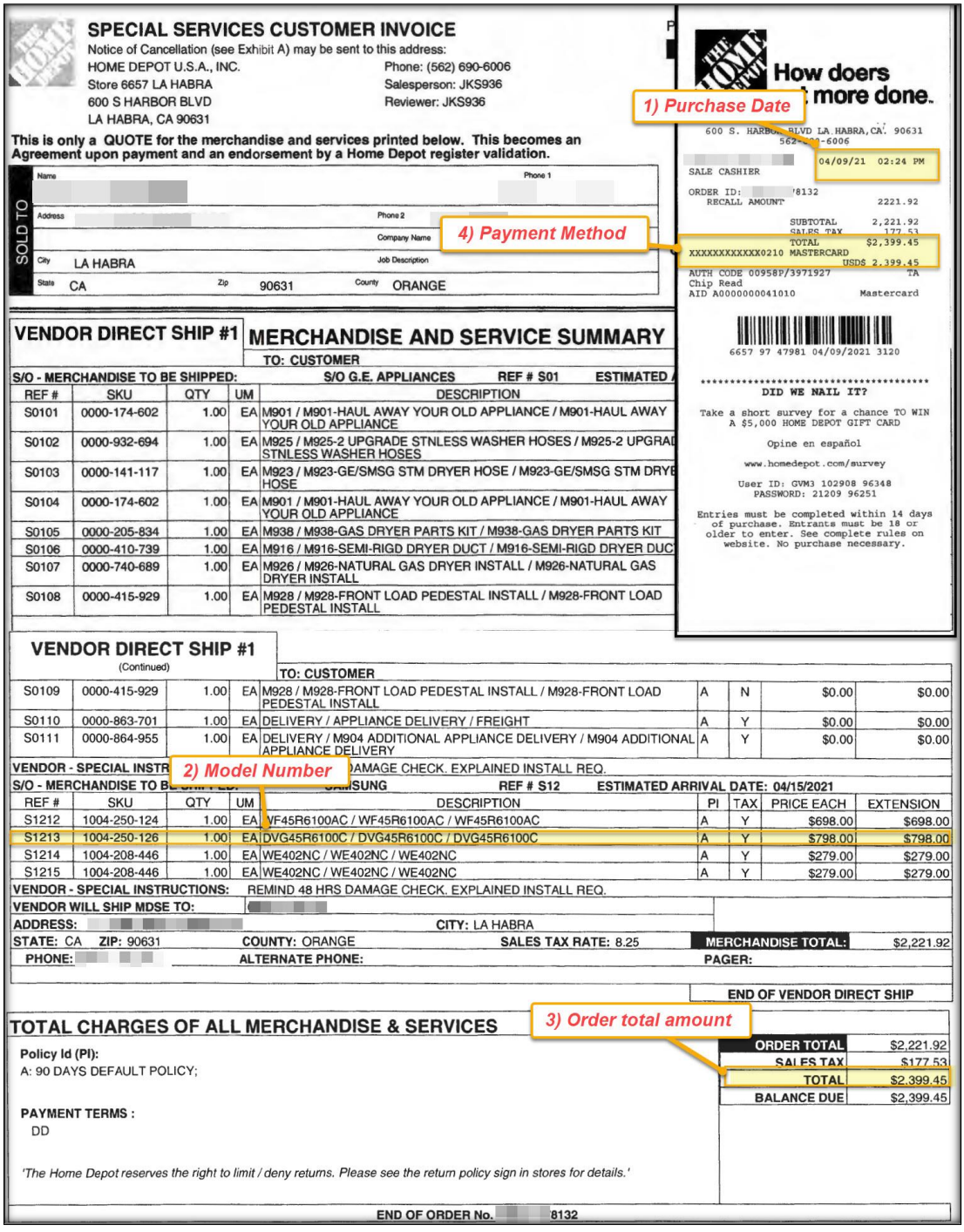
HOME DEPOT 1 – ONLINE RECEIPT: MODEL #, PURCHASE DATE, ORDER TOTAL AMOUNT, AND METHOD OF PAYMENT INCLUDED



HOME DEPOT 2 – INVOICE AND RECEIPT: MODEL #, PURCHASE DATE, ORDER TOTAL AMOUNT, AND METHOD OF PAYMENT INCLUDED

At times the customer will need to provide both the invoice and receipt. The invoice will always contain the model # and receipt will always contain the purchase date and payment method.

If only provided the receipt or the invoice, the processor is able to locate the needed information on the Home Depot website to avoid an INC.



SPECIAL SERVICES CUSTOMER INVOICE

Notice of Cancellation (see Exhibit A) may be sent to this address:
HOME DEPOT U.S.A., INC.
Store 6657 LA HABRA
600 S HARBOR BLVD
LA HABRA, CA 90631
Phone: (562) 690-6006
Salesperson: JKS936
Reviewer: JKS936

This is only a QUOTE for the merchandise and services printed below. This becomes an Agreement upon payment and an endorsement by a Home Depot register validation.

SOLD TO
Name
Address
City LA HABRA
State CA Zip 90631 County ORANGE
Phone 1
Phone 2
Company Name
Job Description

How doers more done.

600 S. HARBOR BLVD LA HABRA,CA. 90631
562-[redacted]-6006
04/09/21 02:24 PM
SALE CASHIER
ORDER ID: [redacted]8132
RECALL AMOUNT 2221.92
SUBTOTAL 2,221.92
SALES TAX 177.53
TOTAL $2,399.45
XXXXXXXXXXXX0210 MASTERCARD
USD$ 2,399.45
AUTH CODE 00958P/3971927 TA
Chip Read
AID A0000000041010 Mastercard
6657 97 47981 04/09/2021 3120

DID WE NAIL IT?
Take a short survey for a chance TO WIN A $5,000 HOME DEPOT GIFT CARD
Opine en español
www.homedepot.com/survey
User ID: GVM3 102908 96348
PASSWORD: 21209 96251
Entries must be completed within 14 days of purchase. Entrants must be 18 or older to enter. See complete rules on website. No purchase necessary.

VENDOR DIRECT SHIP #1 — **MERCHANDISE AND SERVICE SUMMARY**

TO: CUSTOMER

S/O - MERCHANDISE TO BE SHIPPED: S/O G.E. APPLIANCES REF # S01 ESTIMATED

REF #	SKU	QTY	UM	DESCRIPTION
S0101	0000-174-602	1.00	EA	M901 / M901-HAUL AWAY YOUR OLD APPLIANCE / M901-HAUL AWAY YOUR OLD APPLIANCE
S0102	0000-932-694	1.00	EA	M925 / M925-2 UPGRADE STNLESS WASHER HOSES / M925-2 UPGRAD STNLESS WASHER HOSES
S0103	0000-141-117	1.00	EA	M923 / M923-GE/SMSG STM DRYER HOSE / M923-GE/SMSG STM DRYE HOSE
S0104	0000-174-602	1.00	EA	M901 / M901-HAUL AWAY YOUR OLD APPLIANCE / M901-HAUL AWAY YOUR OLD APPLIANCE
S0105	0000-205-834	1.00	EA	M938 / M938-GAS DRYER PARTS KIT / M938-GAS DRYER PARTS KIT
S0106	0000-410-739	1.00	EA	M916 / M916-SEMI-RIGD DRYER DUCT / M916-SEMI-RIGD DRYER DUC
S0107	0000-740-689	1.00	EA	M926 / M926-NATURAL GAS DRYER INSTALL / M926-NATURAL GAS DRYER INSTALL
S0108	0000-415-929	1.00	EA	M928 / M928-FRONT LOAD PEDESTAL INSTALL / M928-FRONT LOAD PEDESTAL INSTALL

VENDOR DIRECT SHIP #1 (Continued)

TO: CUSTOMER

S0109	0000-415-929	1.00	EA	M928 / M928-FRONT LOAD PEDESTAL INSTALL / M928-FRONT LOAD PEDESTAL INSTALL	A	N	$0.00	$0.00
S0110	0000-863-701	1.00	EA	DELIVERY / APPLIANCE DELIVERY / FREIGHT	A	Y	$0.00	$0.00
S0111	0000-864-955	1.00	EA	DELIVERY / M904 ADDITIONAL APPLIANCE DELIVERY / M904 ADDITIONAL APPLIANCE DELIVERY	A	Y	$0.00	$0.00

VENDOR - SPECIAL INSTR [redacted] DAMAGE CHECK. EXPLAINED INSTALL REQ.
S/O - MERCHANDISE TO BE [redacted] SUNG REF # S12 ESTIMATED ARRIVAL DATE: 04/15/2021

REF #	SKU	QTY	UM	DESCRIPTION	PI	TAX	PRICE EACH	EXTENSION
S1212	1004-250-124	1.00	EA	WF45R6100AC / WF45R6100AC / WF45R6100AC	A	Y	$698.00	$698.00
S1213	1004-250-126	1.00	EA	DVG45R6100C / DVG45R6100C / DVG45R6100C	A	Y	$798.00	$798.00
S1214	1004-208-446	1.00	EA	WE402NC / WE402NC / WE402NC	A	Y	$279.00	$279.00
S1215	1004-208-446	1.00	EA	WE402NC / WE402NC / WE402NC	A	Y	$279.00	$279.00

VENDOR - SPECIAL INSTRUCTIONS: REMIND 48 HRS DAMAGE CHECK. EXPLAINED INSTALL REQ.
VENDOR WILL SHIP MDSE TO: [redacted]
ADDRESS: [redacted] CITY: LA HABRA
STATE: CA ZIP: 90631 COUNTY: ORANGE SALES TAX RATE: 8.25 MERCHANDISE TOTAL: $2,221.92
PHONE: [redacted] ALTERNATE PHONE: PAGER:

END OF VENDOR DIRECT SHIP

TOTAL CHARGES OF ALL MERCHANDISE & SERVICES

ORDER TOTAL	$2,221.92
SALES TAX	$177.53
TOTAL	$2,399.45
BALANCE DUE	$2,399.45

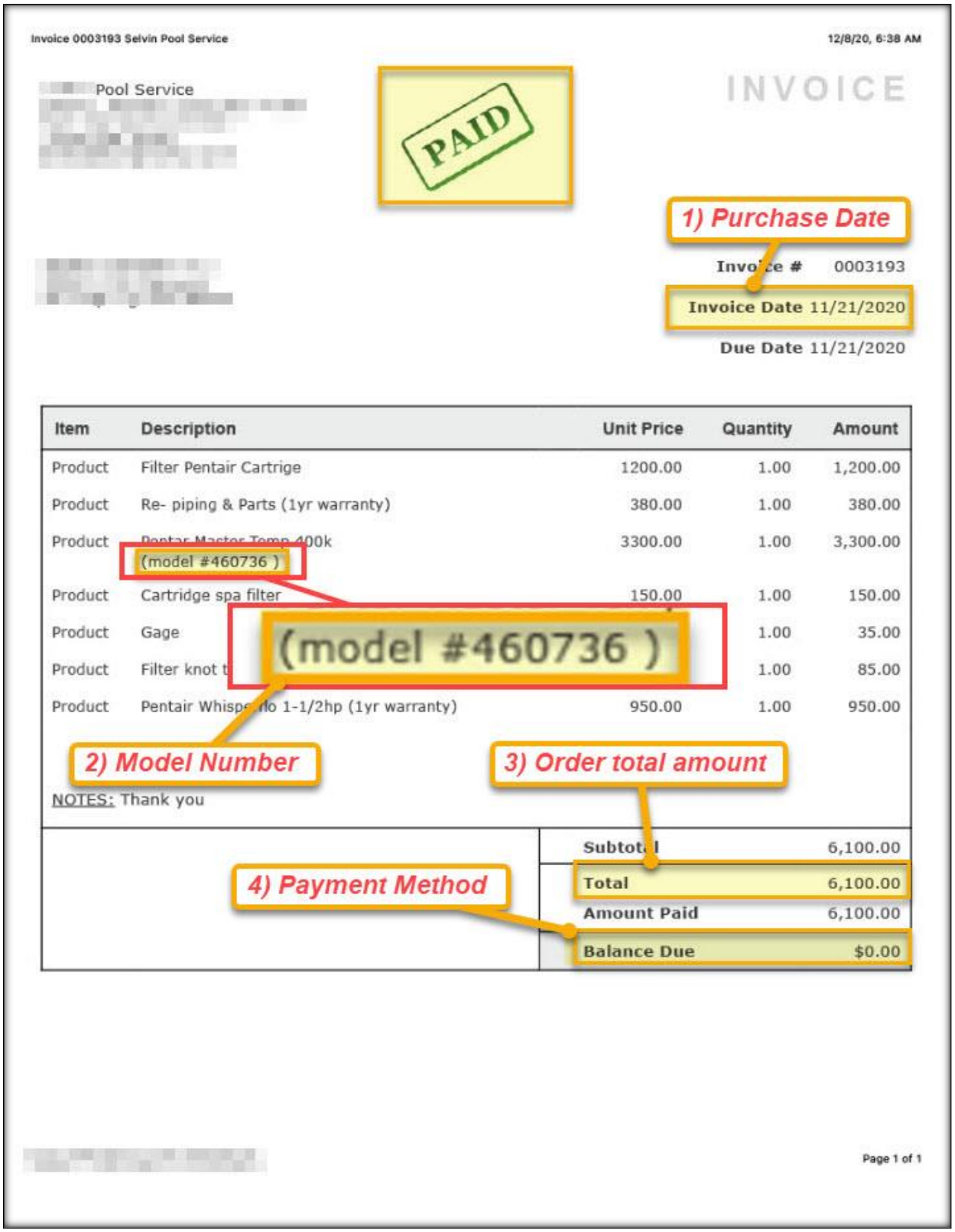
Policy Id (PI):
A: 90 DAYS DEFAULT POLICY;

PAYMENT TERMS :
DD

'The Home Depot reserves the right to limit / deny returns. Please see the return policy sign in stores for details.'

END OF ORDER No. [redacted]8132

CONTRACTOR INVOICE & RECEIPTS



Invoice 0003193 Selvin Pool Service 12/8/20, 6:38 AM

[redacted] Pool Service

[redacted]

PAID

INVOICE

1) Purchase Date

Invoice # 0003193

Invoice Date 11/21/2020

Due Date 11/21/2020

Item	Description	Unit Price	Quantity	Amount
Product	Filter Pentair Cartrige	1200.00	1.00	1,200.00
Product	Re- piping & Parts (1yr warranty)	380.00	1.00	380.00
Product	Pentair Master Temp 400k (model #460736)	3300.00	1.00	3,300.00
Product	Cartridge spa filter	150.00	1.00	150.00
Product	Gage		1.00	35.00
Product	Filter knot t		1.00	85.00
Product	Pentair Whisp do 1-1/2hp (1yr warranty)	950.00	1.00	950.00

(model #460736)

2) Model Number

3) Order total amount

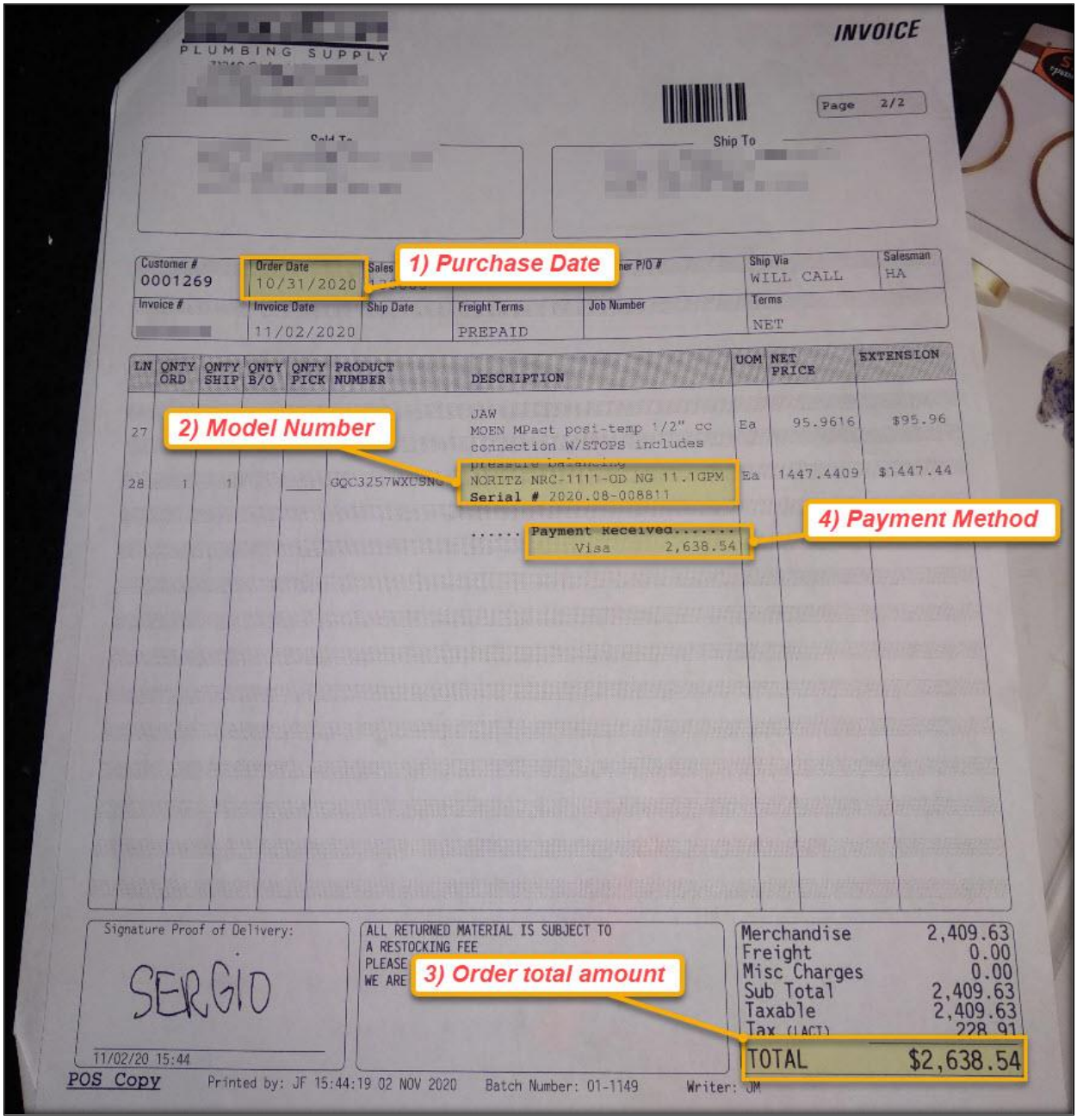
NOTES: Thank you

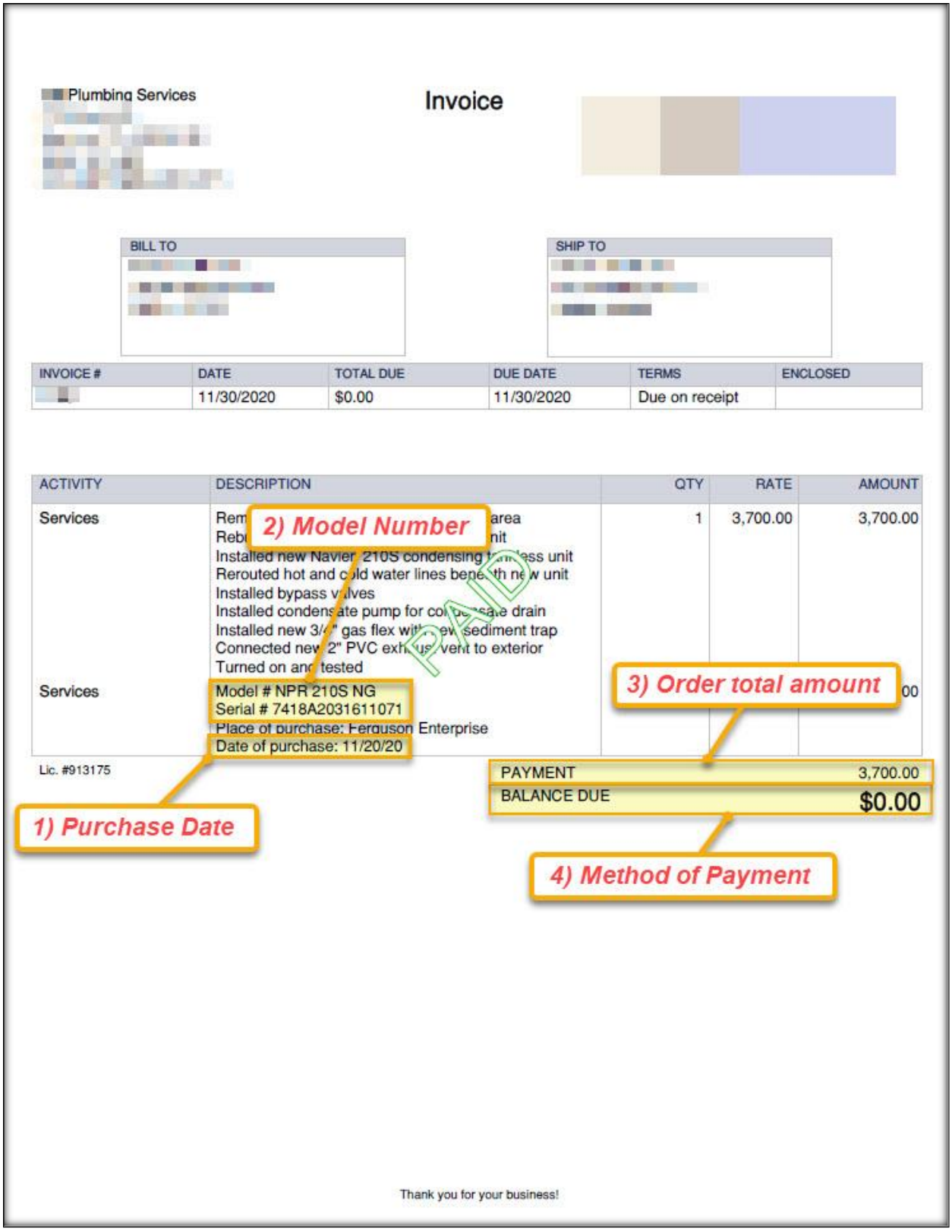
Subtot l	6,100.00
Total	6,100.00
Amount Paid	6,100.00
Balance Due	$0.00

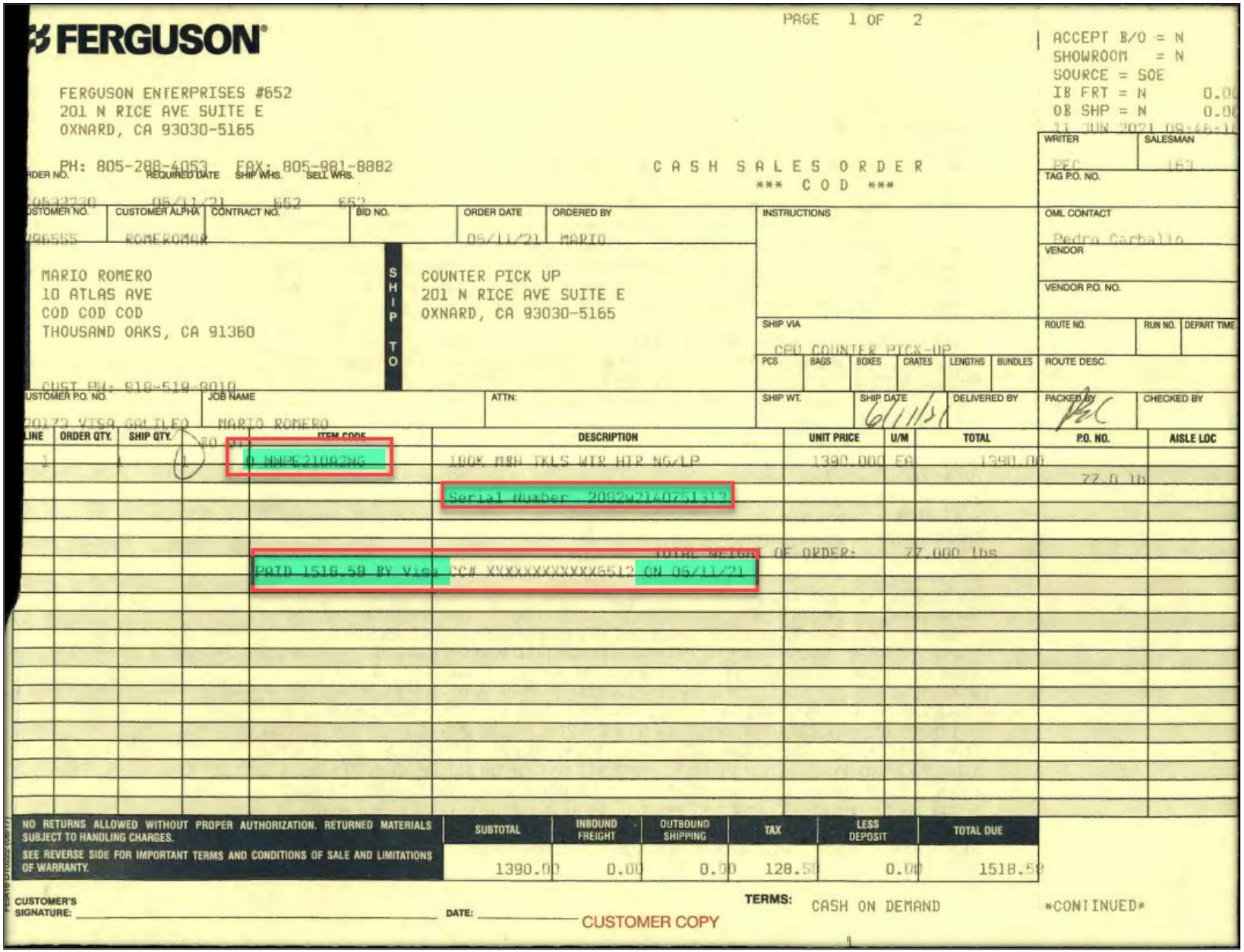
4) Payment Method

[redacted]

Page 1 of 1


PLUMBING SUPPLY
INVOICE
Page 2/2
Ship To
1) Purchase Date
Customer # 0001269
Order Date 10/31/2020
Ship Via WILL CALL
Salesman HA
Invoice Date 11/02/2020
Freight Terms PREPAID
Terms NET
LN
QNTY ORD
QNTY SHIP
QNTY B/O
QNTY PICK
PRODUCT NUMBER
DESCRIPTION
UOM
NET PRICE
EXTENSION
27
JAW
MOEN MPact post-temp 1/2" cc connection W/STOPS includes
Ea
95.9616
$95.96
2) Model Number
28
1
1
GQC3257WXCSNC
NORITZ NRC-1111-OD NG 11.1GPM
Serial # 2020.08-008811
Ea
1447.4409
$1447.44
Payment Received.....
Visa 2,638.54
4) Payment Method
Signature Proof of Delivery:
SERGIO
11/02/20 15:44
ALL RETURNED MATERIAL IS SUBJECT TO A RESTOCKING FEE
PLEASE
WE ARE
3) Order total amount
Merchandise 2,409.63
Freight 0.00
Misc Charges 0.00
Sub Total 2,409.63
Taxable 2,409.63
Tax (LACT) 228.91
TOTAL $2,638.54
POS Copy
Printed by: JF 15:44:19 02 NOV 2020
Batch Number: 01-1149
Writer: JM


Plumbing Services
Invoice
BILL TO
SHIP TO
INVOICE # | DATE | TOTAL DUE | DUE DATE | TERMS | ENCLOSED
11/30/2020 | $0.00 | 11/30/2020 | Due on receipt
ACTIVITY | DESCRIPTION | QTY | RATE | AMOUNT
Services
Installed bypass valves
Turned on and tested
1 | 3,700.00 | 3,700.00
Services
Model # NPR 210S NG
Serial # 7418A2031611071
Date of purchase: 11/20/20
Lic. #913175
PAYMENT 3,700.00
BALANCE DUE $0.00
2) Model Number
3) Order total amount
1) Purchase Date
4) Method of Payment
PAID
Thank you for your business!



FERGUSON

PAGE 1 OF 2

ACCEPT B/O = N
SHOWROOM = N
SOURCE = SOE
IB FRT = N 0.0
OB SHP = N 0.0
11 JUN 2021 09:46:1

FERGUSON ENTERPRISES #652
201 N RICE AVE SUITE E
OXNARD, CA 93030-5165

PH: 805-288-4053 FAX: 805-981-8882

CASH SALES ORDER
*** COD ***

ORDER NO.	REQUIRED DATE	SHIP WHS.	SELL WHS.	WRITER	SALESMAN
10633230	06/11/21	652	652	REC	153

TAG P.O. NO.

CUSTOMER NO.	CUSTOMER ALPHA	CONTRACT NO.	BID NO.	ORDER DATE	ORDERED BY
296555	ROMEROMAR			06/11/21	MARIO

INSTRUCTIONS

OML CONTACT: Pedro Carballo

VENDOR

VENDOR P.O. NO.

MARIO ROMERO
10 ATLAS AVE
COD COD COD
THOUSAND OAKS, CA 91360

CUST PH: 818-519-8010

SHIP TO
COUNTER PICK UP
201 N RICE AVE SUITE E
OXNARD, CA 93030-5165

SHIP VIA: CPU COUNTER PICK-UP

ROUTE NO. | RUN NO. | DEPART TIME

PCS	BAGS	BOXES	CRATES	LENGTHS	BUNDLES

ROUTE DESC.

CUSTOMER P.O. NO.	JOB NAME	ATTN:	SHIP WT.	SHIP DATE	DELIVERED BY	PACKED BY	CHECKED BY
20173 VISA CAPTURED	MARIO ROMERO			6/11/21			

LINE	ORDER QTY.	SHIP QTY.	ITEM CODE	DESCRIPTION	UNIT PRICE	U/M	TOTAL	P.O. NO.	AISLE LOC
1	1	1	0 NNPE210A2NG	100K M&H TKLS WTR HTR NG/LP	1390.000	EA	1390.00	77.0 lb	
				Serial Number 2092M2140751313					
				TOTAL WEIGHT OF ORDER: 77.000 lbs					
				PAID 1518.58 BY Visa CC# XXXXXXXXXXXX6512 ON 06/11/21					

NO RETURNS ALLOWED WITHOUT PROPER AUTHORIZATION. RETURNED MATERIALS SUBJECT TO HANDLING CHARGES.
SEE REVERSE SIDE FOR IMPORTANT TERMS AND CONDITIONS OF SALE AND LIMITATIONS OF WARRANTY.

SUBTOTAL	INBOUND FREIGHT	OUTBOUND SHIPPING	TAX	LESS DEPOSIT	TOTAL DUE
1390.00	0.00	0.00	128.58	0.00	1518.58

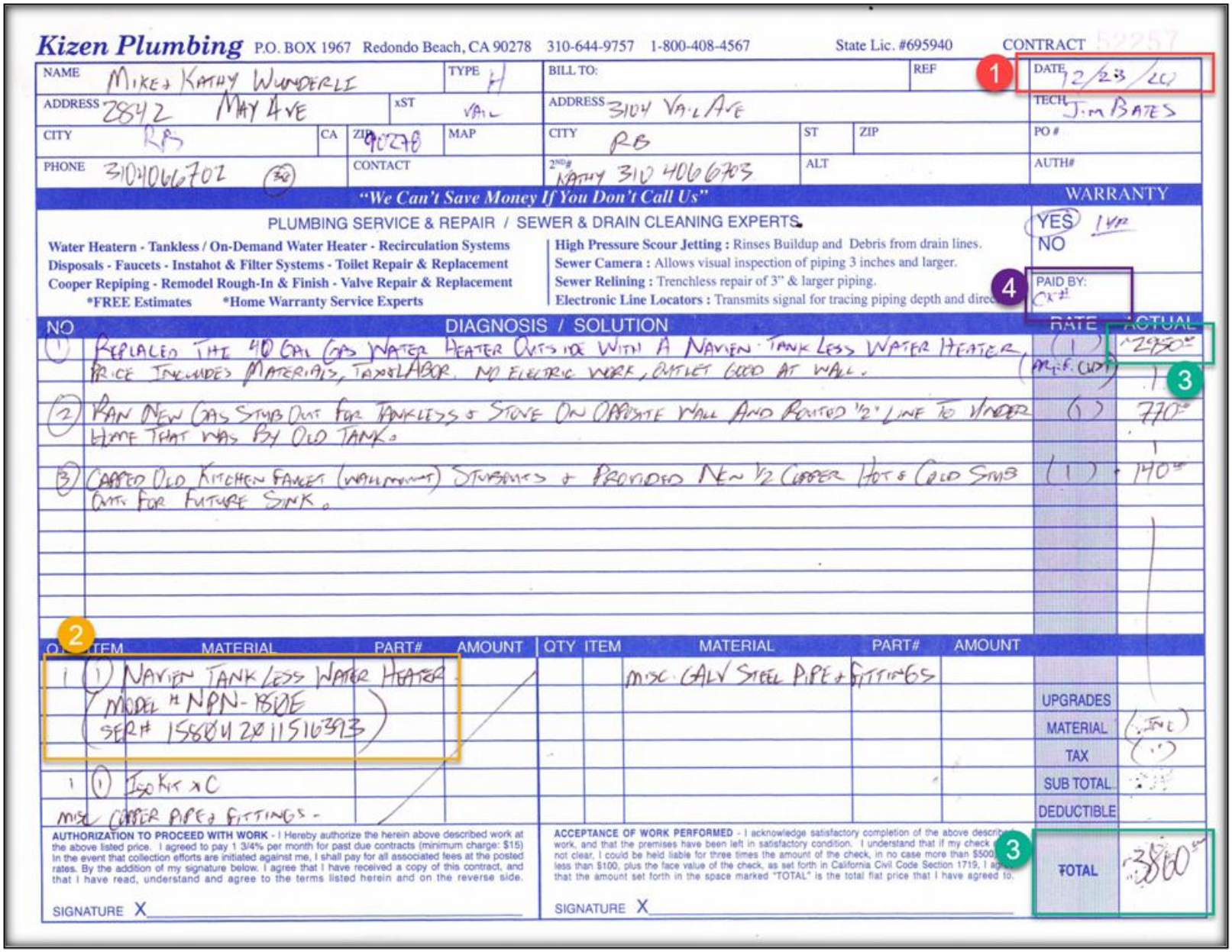
CUSTOMER'S SIGNATURE: _____ DATE: _____

CUSTOMER COPY

TERMS: CASH ON DEMAND

CONTINUED

Confidential and Proprietary Information



Kizen Plumbing P.O. BOX 1967 Redondo Beach, CA 90278 310-644-9757 1-800-408-4567 State Lic. #695940 CONTRACT 52257

NAME Mike & Kathy Wunderli	TYPE H	BILL TO:	REF	1 DATE 12/23/20	
ADDRESS 2842 May Ave	xST Vail	ADDRESS 3104 Vail Ave		TECH Jim Bates	
CITY RB	CA ZIP 90278	MAP	CITY RB	ST ZIP	PO #
PHONE 3104066702 (H)	CONTACT	2ND# Kathy 310 4066703	ALT		AUTH#

"We Can't Save Money If You Don't Call Us"

PLUMBING SERVICE & REPAIR / SEWER & DRAIN CLEANING EXPERTS

Water Heatern - Tankless / On-Demand Water Heater - Recirculation Systems
Disposals - Faucets - Instahot & Filter Systems - Toilet Repair & Replacement
Cooper Repiping - Remodel Rough-In & Finish - Valve Repair & Replacement
***FREE Estimates *Home Warranty Service Experts**

High Pressure Scour Jetting : Rinses Buildup and Debris from drain lines.
Sewer Camera : Allows visual inspection of piping 3 inches and larger.
Sewer Relining : Trenchless repair of 3" & larger piping.
Electronic Line Locators : Transmits signal for tracing piping depth and direc

WARRANTY: (YES) 1 yr / NO

4 PAID BY: CK #

NO	DIAGNOSIS / SOLUTION	RATE	ACTUAL
1	Replaced the 40 Gal Gas Water Heater Outside With A Navien Tank Less Water Heater. Price Includes Materials, Tax & Labor. No Electric Work, Outlet Good At Wall.	(1) (Mfr. Cost)	~2950~ 3
2	Ran New Gas Stub Out For Tankless & Stove On Opposite Wall And Routed 1/2" Line To Under Home That Was By Old Tank.	(1)	770~
3	Capped Old Kitchen Faucet (Wall Mount) Stubbies & Provided New 1/2 Copper Hot & Cold Stubs Out For Future Sink.	(1)	140~

2

QTY	ITEM	MATERIAL	PART#	AMOUNT
1	(1)	Navien Tank Less Water Heater (Model # NPN-180E Ser# 15880420115163973)		
1	(1)	Iso Kit x C		
Misc		Copper Pipe & Fittings -		

QTY	ITEM	MATERIAL	PART#	AMOUNT
		Misc. Galv Steel Pipe & Fittings		

UPGRADES	
MATERIAL	(Incl)
TAX	(-)
SUB TOTAL	
DEDUCTIBLE	
TOTAL	~3860~

AUTHORIZATION TO PROCEED WITH WORK - I Hereby authorize the herein above described work at the above listed price. I agreed to pay 1 3/4% per month for past due contracts (minimum charge: $15) In the event that collection efforts are initiated against me, I shall pay for all associated fees at the posted rates. By the addition of my signature below, I agree that I have received a copy of this contract, and that I have read, understand and agree to the terms listed herein and on the reverse side.

SIGNATURE X

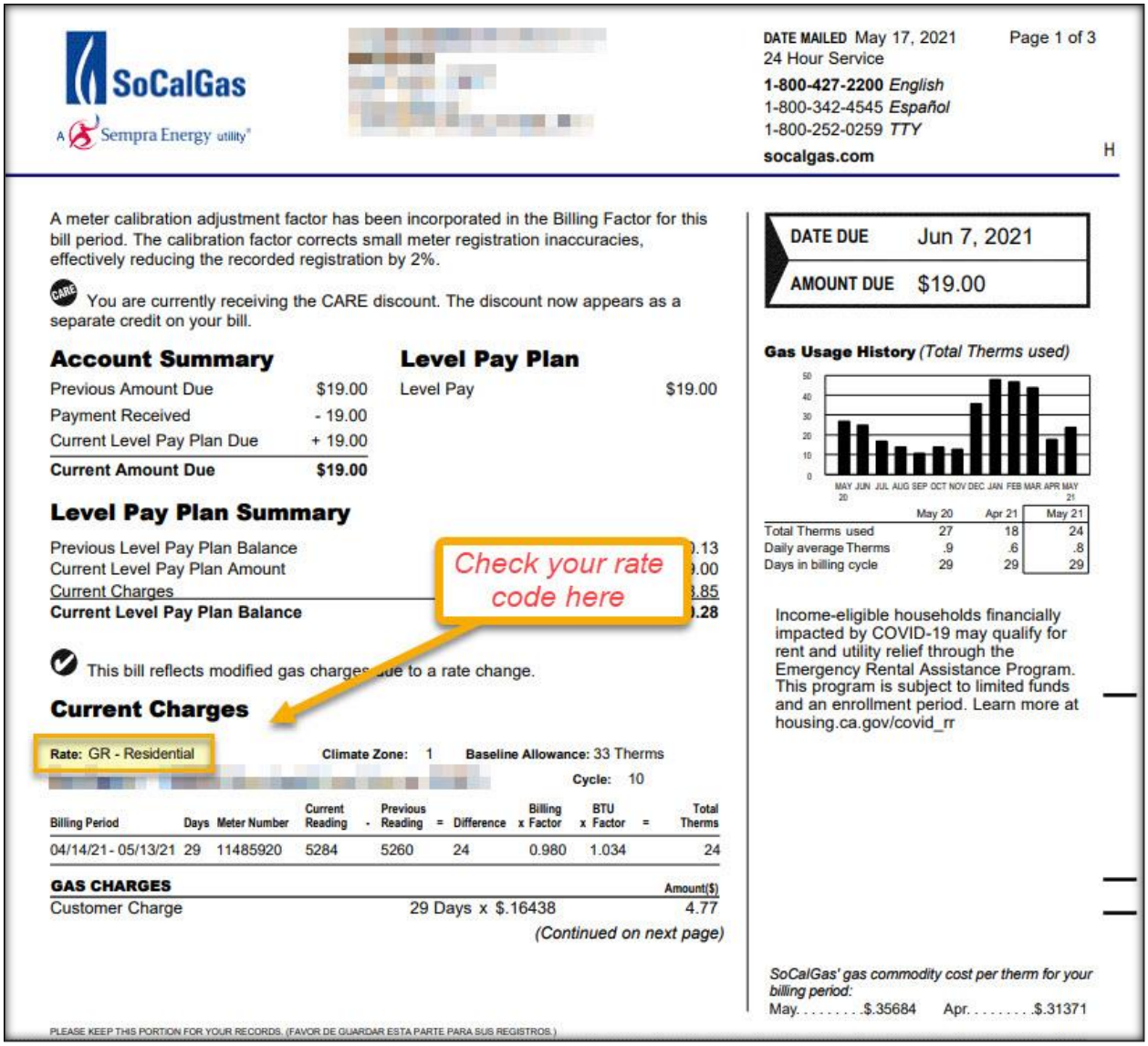
ACCEPTANCE OF WORK PERFORMED - I acknowledge satisfactory completion of the above describ work, and that the premises have been left in satisfactory condition. I understand that if my check not clear, I could be held liable for three times the amount of the check, in no case more than $500 less than $100, plus the face value of the check, as set forth in California Civil Code Section 1719. I ag that the amount set forth in the space marked "TOTAL" is the total flat price that I have agreed to.

3

SIGNATURE X

Confidential and Proprietary Information

EXAMPLE OF A SOCALGAS BILL



SoCalGas
A Sempra Energy utility

[redacted]

DATE MAILED May 17, 2021 Page 1 of 3
24 Hour Service
1-800-427-2200 *English*
1-800-342-4545 *Español*
1-800-252-0259 *TTY*
socalgas.com
H

A meter calibration adjustment factor has been incorporated in the Billing Factor for this bill period. The calibration factor corrects small meter registration inaccuracies, effectively reducing the recorded registration by 2%.

CARE You are currently receiving the CARE discount. The discount now appears as a separate credit on your bill.

Account Summary

Previous Amount Due	$19.00
Payment Received	- 19.00
Current Level Pay Plan Due	+ 19.00
Current Amount Due	**$19.00**

Level Pay Plan

Level Pay	$19.00

Level Pay Plan Summary

Previous Level Pay Plan Balance	.13
Current Level Pay Plan Amount	.00
Current Charges	.85
Current Level Pay Plan Balance	**.28**

Check your rate code here

This bill reflects modified gas charges due to a rate change.

Current Charges

Rate: GR - Residential **Climate Zone:** 1 **Baseline Allowance:** 33 Therms
Cycle: 10

Billing Period	Days	Meter Number	Current Reading	- Previous Reading	= Difference	Billing x Factor	BTU x Factor	= Total Therms
04/14/21 - 05/13/21	29	11485920	5284	5260	24	0.980	1.034	24

GAS CHARGES		Amount($)
Customer Charge	29 Days x $.16438	4.77

(Continued on next page)

PLEASE KEEP THIS PORTION FOR YOUR RECORDS. (FAVOR DE GUARDAR ESTA PARTE PARA SUS REGISTROS.)

DATE DUE	Jun 7, 2021
AMOUNT DUE	$19.00

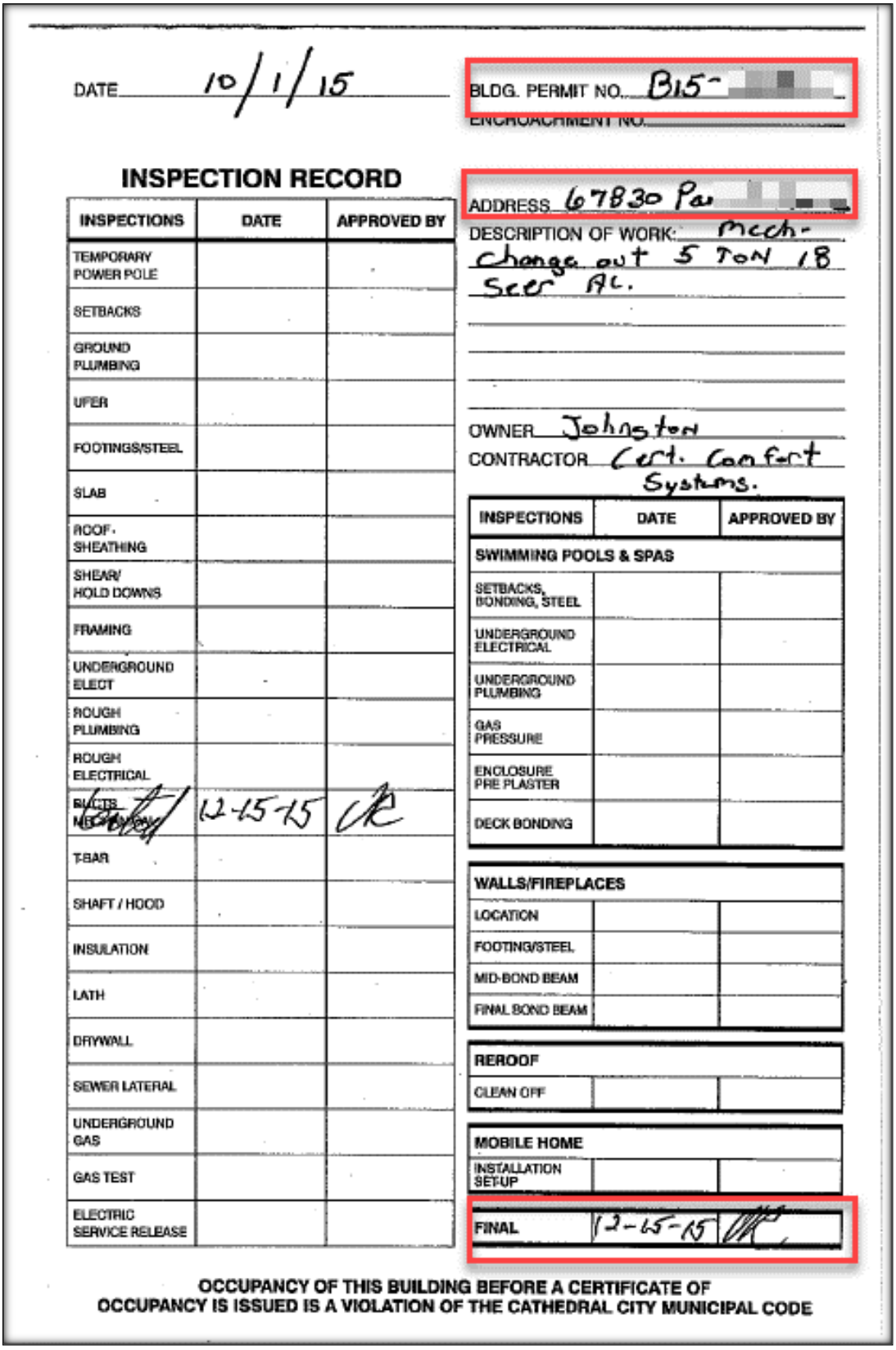
Gas Usage History *(Total Therms used)*

	May 20	Apr 21	May 21
Total Therms used	27	18	24
Daily average Therms	.9	.6	.8
Days in billing cycle	29	29	29

Income-eligible households financially impacted by COVID-19 may qualify for rent and utility relief through the Emergency Rental Assistance Program. This program is subject to limited funds and an enrollment period. Learn more at housing.ca.gov/covid_rr

SoCalGas' gas commodity cost per therm for your billing period:
May.$.35684 Apr.$.31371

EXAMPLES OF PERMIT CLOSURES



DATE 10/1/15

BLDG. PERMIT NO. B15-[redacted]

ENCROACHMENT NO.

ADDRESS 67830 Pa[redacted]

DESCRIPTION OF WORK: Mech- change out 5 TON 18 Seer AC.

OWNER Johnston

CONTRACTOR Cert. Comfort Systems.

INSPECTION RECORD

INSPECTIONS	DATE	APPROVED BY
TEMPORARY POWER POLE		
SETBACKS		
GROUND PLUMBING		
UFER		
FOOTINGS/STEEL		
SLAB		
ROOF - SHEATHING		
SHEAR/ HOLD DOWNS		
FRAMING		
UNDERGROUND ELECT		
ROUGH PLUMBING		
ROUGH ELECTRICAL		
BUCTB [illegible]	12-15-15	[illegible]
T-BAR		
SHAFT / HOOD		
INSULATION		
LATH		
DRYWALL		
SEWER LATERAL		
UNDERGROUND GAS		
GAS TEST		
ELECTRIC SERVICE RELEASE		

INSPECTIONS	DATE	APPROVED BY
SWIMMING POOLS & SPAS		
SETBACKS, BONDING, STEEL		
UNDERGROUND ELECTRICAL		
UNDERGROUND PLUMBING		
GAS PRESSURE		
ENCLOSURE PRE PLASTER		
DECK BONDING		
WALLS/FIREPLACES		
LOCATION		
FOOTING/STEEL		
MID-BOND BEAM		
FINAL BOND BEAM		
REROOF		
CLEAN OFF		
MOBILE HOME		
INSTALLATION SETUP		
FINAL	12-15-15	[illegible]

OCCUPANCY OF THIS BUILDING BEFORE A CERTIFICATE OF OCCUPANCY IS ISSUED IS A VIOLATION OF THE CATHEDRAL CITY MUNICIPAL CODE

CITY OF LA QUINTA

COMMUNITY DEVELOPMENT DEPARTMENT
(760) 777-7125
INSPECTION REQUEST LINE
(760) 777-7153

Owner DENNIS MOGENSEN

Contractor CERTIFIED COMFORT SYSTEMS INC

Permit Number BMCH2015[redacted]

POST ON JOB IN A CONSPICUOUS PLACE

INSPECTOR MUST SIGN ALL APPLICABLE SPACES

JOB ADDRESS 79195 MAND[redacted]

NOTES HVAC CHANGE OUT - (2)16SEER/78AFUE SPLIT SYSTEMS [2013 ENERGY] CARBON MONOXIDE ALARM(S) TO BE INSTALLED PRIOR TO FINAL INSPECTION. 2013 CALIFORNIA BUILDING CODES.

TYPE OF INSPECTION	DATE	INSP
TEMPORARY POWER		
SETBACKS		
U/G PLUMBING / WASTE		
U/G ELECTRICAL / GROUNDING		
FOOTINGS / STEEL		
CONCRETE SLAB		
DO NOT POUR CONCRETE UNTIL ABOVE SIGNED		
ROOF NAIL / PRE-ROOF		
OKAY TO WRAP		
FRAMING (COMBINATION)		
ROUGH ELECTRIC		
ROUGH PLUMBING		
ROUGH MECHANICAL		
INSULATION		
COVER NO WORK UNTIL ABOVE SIGNED		
INTERIOR GYP. BD. (DRYWALL)		
EXTERIOR LATH		
GAS TEST		
SEPTIC ABANDONMENT		
SEWER CONNECTION		
SEPTIC / GREASE INTERCEPTOR		
MASONRY INSPECTIONS		
FOOTINGS / STEEL		
BOND BEAM		
POOL / SPA / WATER FEATURE INSPECTIONS		
PRE-GUNITE / SETBACKS		
U/G PLUMBING		
U/G GAS		
U/G ELECTRICAL		
PRE-PLASTER (ALARMS / BARRIERS)		
PERIMETER SURFACE BONDING		
FINAL INSPECTIONS		
TEMP. USE OF PERMANENT POWER		
ELECTRICAL		
PLUMBING		
MECHANICAL	12/3/2015	
PUBLIC WORKS DEPARTMENT		
PLANNING DIVISION		
FINAL / JOB COMPLETED		

ABOVE APPROVALS DO NOT INCLUDE THE RIGHT TO TURN ON UTILITIES OR OCCUPY BUILDING

La Quinta

DPMENT DEPARTMENT
IG PERMIT

VOICE (760) 777-7125
FAX (760) 777-7011
INSPECTIONS (760) 777-7153

Date: 11/30/2015

LIT SYSTEMS [redacted]

Contractor:
CERTIFIED COMFORT SYSTEMS INC DBA HYDES
42-949 MADIO STREET
INDIO, CA 92201

(760)360-2202
Lic. No.: 906115

WORKER'S COMPENSATION DECLARATION

I hereby affirm under penalty of perjury one of the following declarations:

_____ I have and will maintain a certificate of consent to self-insure for workers' compensation, as provided for by Section 3700 of the Labor Code, for the performance of the work for which this permit is issued.

_____ I have and will maintain workers' compensation insurance, as required by Section 3700 of the Labor Code, for the performance of the work for which this permit is issued. My workers' compensation insurance carrier and policy number are:
Carrier: _____ Policy Number: _____

_____ I certify that in the performance of the work for which this permit is issued, I shall not employ any person in any manner so as to become subject to the workers' compensation laws of California, and agree that, if I should become subject to the workers' compensation provisions of Section 3700 of the Labor Code, I shall forthwith comply with those provisions.

Date: _____ Applicant: _____

WARNING: FAILURE TO SECURE WORKERS' COMPENSATION COVERAGE IS UNLAWFUL, AND SHALL SUBJECT AN EMPLOYER TO CRIMINAL PENALTIES AND CIVIL FINES UP TO ONE HUNDRED THOUSAND DOLLARS ($100,000). IN ADDITION TO THE COST OF COMPENSATION, DAMAGES AS PROVIDED FOR IN SECTION 3706 OF THE LABOR CODE, INTEREST, AND ATTORNEY'S FEES.

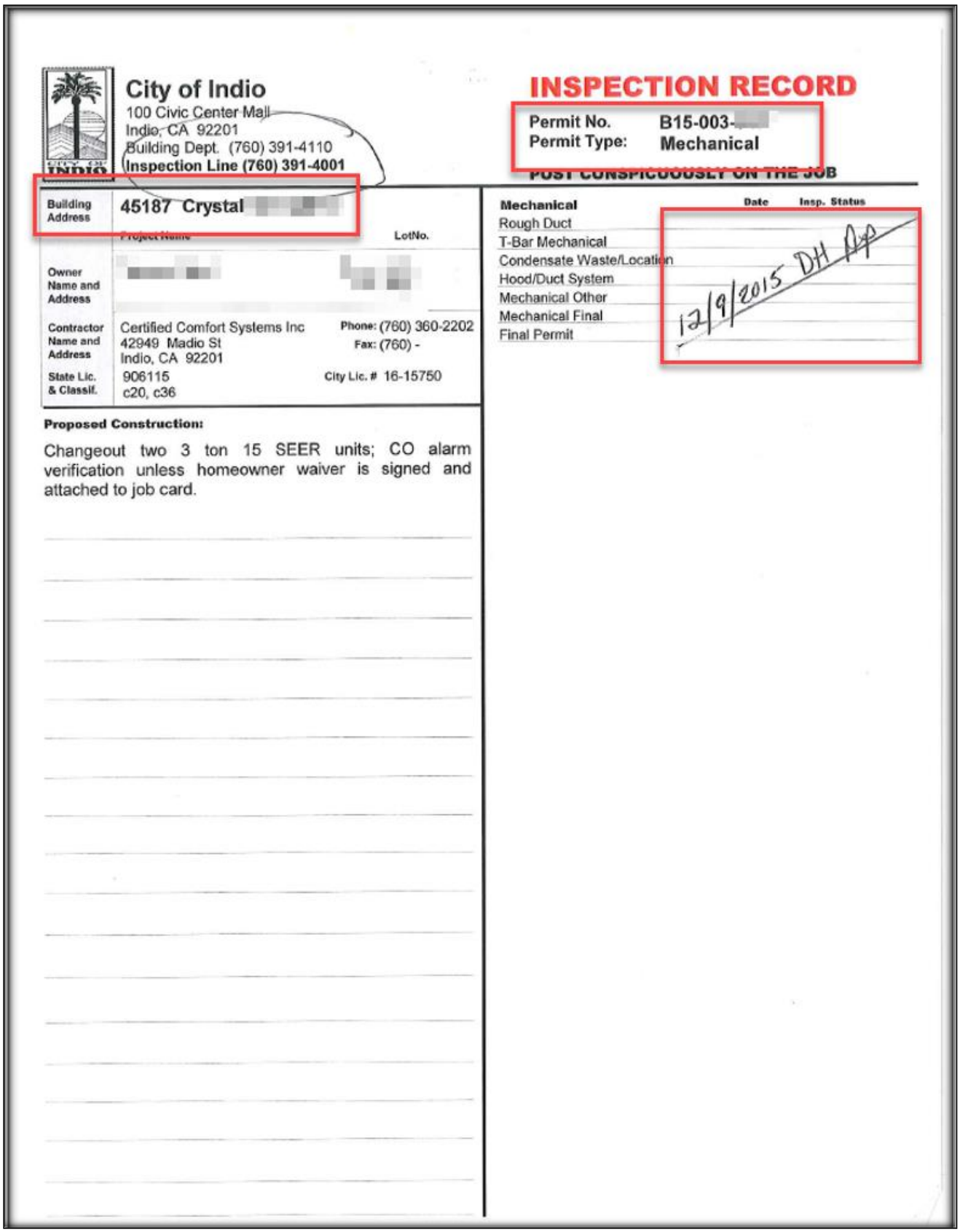
APPLICANT ACKNOWLEDGEMENT

IMPORTANT: Application is hereby made to the Building Official for a permit subject to the conditions and restrictions set forth on this application.

1. Each person upon whose behalf this application is made, each person at whose request and for whose benefit work is performed under or pursuant to any permit issued as a result of this application , the owner, and the applicant, each agrees to, and shall defend, indemnify and hold harmless the City of La Quinta, its officers, agents, and employees for any act or omission related to the work being performed under or following issuance of this permit.
2. Any permit issued as a result of this application becomes null and void if work is not commenced within **180 days** from date of issuance of such permit, or cessation of work for 180 days will subject permit to cancellation.

I certify that I have read this application and state that the above information is correct. I agree to comply with all city and county ordinances and state laws relating to building construction, and hereby authorize representatives of this city to enter upon the above-mentioned property for inspection purposes.

Date: _____ Signature (Applicant or Agent): _____



City of Indio

100 Civic Center Mall
Indio, CA 92201
Building Dept. (760) 391-4110
Inspection Line (760) 391-4001

INSPECTION RECORD

Permit No. B15-003-
Permit Type: Mechanical

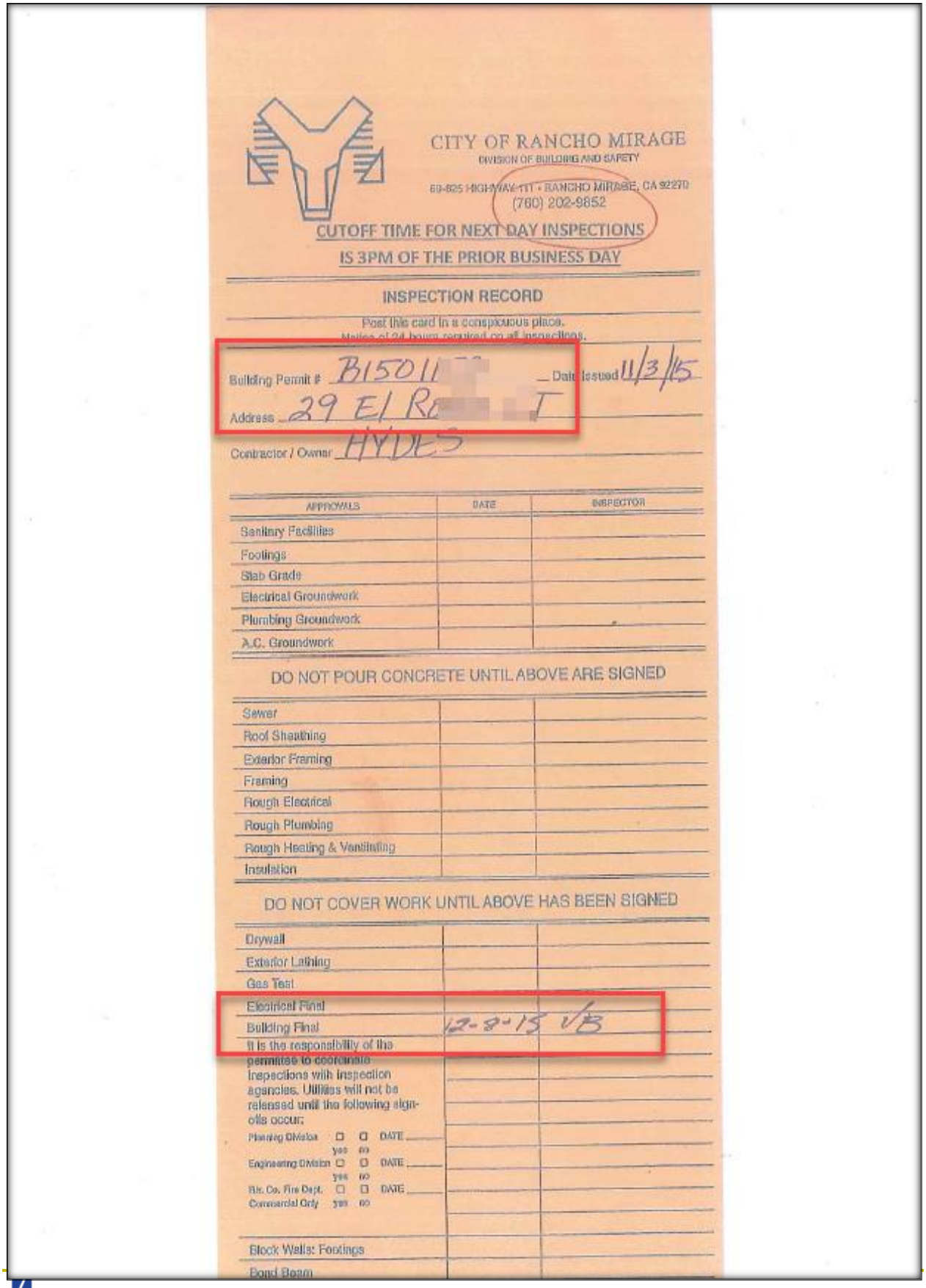
POST CONSPICUOUSLY ON THE JOB

Building Address	45187 Crystal
Project Name	Lot No.
Owner Name and Address	
Contractor Name and Address	Certified Comfort Systems Inc 42949 Madio St Indio, CA 92201
Phone: (760) 360-2202	Fax: (760) -
State Lic. & Classif.	906115 c20, c36
City Lic. # 16-15750	

Proposed Construction:

Changeout two 3 ton 15 SEER units; CO alarm verification unless homeowner waiver is signed and attached to job card.

Mechanical	Date	Insp. Status
Rough Duct		
T-Bar Mechanical		
Condensate Waste/Location		
Hood/Duct System		
Mechanical Other		
Mechanical Final	12/9/2015	DH AP
Final Permit		



CITY OF RANCHO MIRAGE
DIVISION OF BUILDING AND SAFETY
69-825 HIGHWAY 111 • RANCHO MIRAGE, CA 92270
(760) 202-9852

CUTOFF TIME FOR NEXT DAY INSPECTIONS
IS 3PM OF THE PRIOR BUSINESS DAY

INSPECTION RECORD

Post this card in a conspicuous place.
Notice of 24 hours required on all inspections.

Building Permit # B1501[illegible] Date Issued 11/3/15

Address 29 El R[illegible] T

Contractor / Owner HYDES

APPROVALS	DATE	INSPECTOR
Sanitary Facilities		
Footings		
Slab Grade		
Electrical Groundwork		
Plumbing Groundwork		
A.C. Groundwork		

DO NOT POUR CONCRETE UNTIL ABOVE ARE SIGNED

Sewer		
Roof Sheathing		
Exterior Framing		
Framing		
Rough Electrical		
Rough Plumbing		
Rough Heating & Ventilating		
Insulation		

DO NOT COVER WORK UNTIL ABOVE HAS BEEN SIGNED

Drywall		
Exterior Lathing		
Gas Test		
Electrical Final		
Building Final	12-8-15 VB	
It is the responsibility of the permittee to coordinate inspections with inspection agencies. Utilities will not be released until the following sign-offs occur:		
Planning Division ☐ yes ☐ no DATE		
Engineering Division ☐ yes ☐ no DATE		
Riv. Co. Fire Dept. Commercial Only ☐ yes ☐ no DATE		
Block Walls: Footings		
Bond Beam		

INSPECTION INFORMATION

No work shall be concealed without a signature by the inspector.

The approved plans and this card must always be available to the inspector. Preserve this record.

A permit shall expire and become null and void if substantial work is not commenced within 180 days, or if the work is suspended or abandoned for a period of 180 days. If the work is progressing but approaching the end of the 180 day period from the last recorded day of a passed inspection, a progress inspection must be obtained to keep an active permit.

CONSTRUCTION HOURS

Weekdays	7am to 7pm
Saturdays	8am to 5pm
Sundays & Holidays	**Not Permitted**

JOB NOTES:

JOB CARD

Project address: 1288 San

Permit #: 2015-3

Inspection hours 8AM - 4PM Monday - Thursday

Inspection request line (760) 323-8243

Building Department (760) 323-8242

Building Department Fax (760) 322-8342

MECHANICAL CHANGEOUT INSPECTIONS

AC/Compliance Forms Final 10/8/15 KFox

CITY OF PALM DESERT INSPECTION RECORD

B ADDRESS: 278 CORTE

TYPE OF PERMIT: *HVAC C/O ONLY RES TIER 2

PROJ #: 15-00067

PRINT DATE: 10/08/15

PHONE #: (760)360-2202

CONTRACTOR: HYDE'S
42949 MADIO ST
INDIO CA 92201

STEP	REQUIRED INSPECTIONS GROUP 1	INSPECTOR SIGNATURE/DATE
10 ME2	02 ROUGH DUCT/HVAC	
10 RR2	SMOKE/CARBON MONOXIDE ALARMS---------->	

STEP	REQUIRED INSPECTIONS GROUP 2	INSPECTOR SIGNATURE/DATE
10 ME99	04 FINAL HEATING/REFRIGERATION	

EXAMPLES OF ACCEPTABLE METHOD OF PAYMENTS

Checks are acceptable when provided by their banks like the image below or when they provide a copy of the back and front of the check and it is signed indicating it has been cashed.



7/10/2021 Account Detail - Wells Fargo

WELLS FARGO

Check Details

Check Number	[redacted]
Date Posted	07/02/21
Check Amount	$3,686.00

826

6/30/21 DATE

PAY TO THE ORDER OF Justin Kleins Pool Svs $ 3,686

Three Thousand six hundred eighty five DOLLARS

Wells Fargo Bank, N.A. New York wellsfargo.com

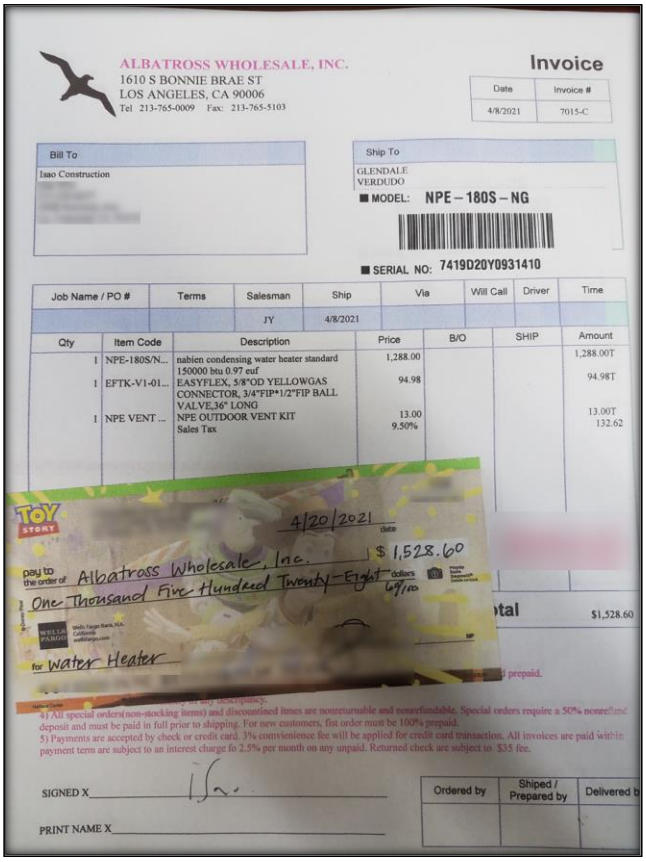
FOR Heater

[redacted]

For your security, information like account numbers, signatures, and the ability to view the backs of checks have been removed from the images.
You can see full or partial fronts and backs of the images by using the link at the top of the window.

Equal Housing Lender

Checks are **NOT** acceptable when provided the front of the check only or a carbon copy. We need the back of the check signed/endorsed, which would indicate it has been cashed. The invoice below would **NOT** be acceptable.



ALBATROSS WHOLESALE, INC.
1610 S BONNIE BRAE ST
LOS ANGELES, CA 90006
Tel 213-765-0009 Fax: 213-765-5103

Invoice

Date	Invoice #
4/8/2021	7015-C

Bill To
Isao Construction

Ship To
GLENDALE
VERDUDO
■ MODEL: NPE – 180S – NG
■ SERIAL NO: 7419D20Y0931410

Job Name / PO #	Terms	Salesman	Ship	Via	Will Call	Driver	Time
		JY	4/8/2021				

Qty	Item Code	Description	Price	B/O	SHIP	Amount
1	NPE-180S/N...	nabien condensing water heater standard 150000 btu 0.97 euf	1,288.00			1,288.00T
1	EFTK-V1-01...	EASYFLEX, 5/8"OD YELLOWGAS CONNECTOR, 3/4"FIP*1/2"FIP BALL VALVE,36" LONG	94.98			94.98T
1	NPE VENT ...	NPE OUTDOOR VENT KIT	13.00			13.00T
		Sales Tax	9.50%			132.62

TOY STORY

4/20/2021 date

pay to the order of Albatross Wholesale, Inc. $ 1,528.60

One Thousand Five Hundred Twenty-Eight dollars 60/100

Wells Fargo Bank, N.A. California wellsfargo.com

for Water Heater

tal $1,528.60

prepaid.

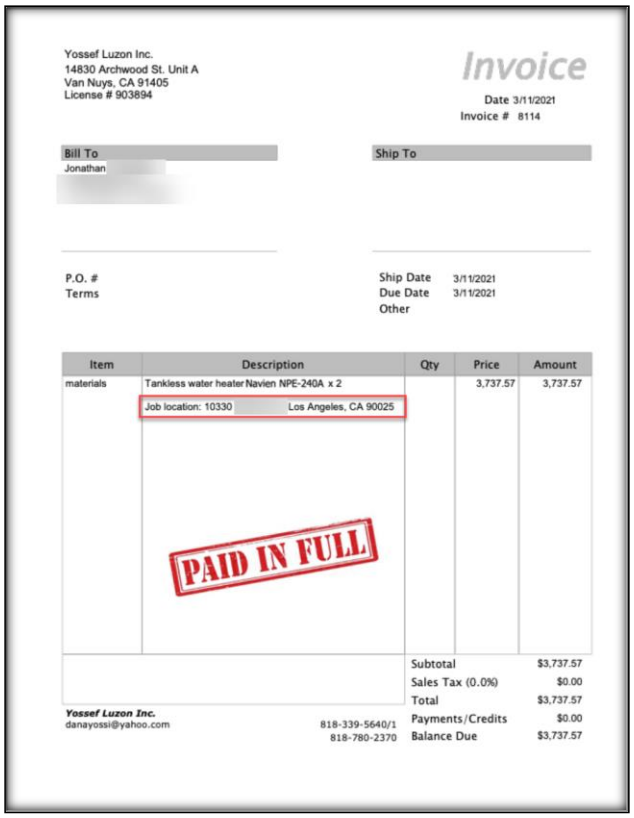
4) All special orders(non-stocking items) and discontinued items are nonreturnable and nonrefundable. Special orders require a 50% nonrefund deposit and must be paid in full prior to shipping. For new customers, 1st order must be 100% prepaid.
5) Payments are accepted by check or credit card. 3% convenience fee will be applied for credit card transaction. All invoices are paid within payment term are subject to an interest charge fo 2.5% per month on any unpaid. Returned check are subject to $35 fee.

SIGNED X

PRINT NAME X

Ordered by	Shiped / Prepared by	Delivered b

EXAMPLES OF "INSTALL ADDRESS" OR "JOB LOCATION" INVOICES



Yossef Luzon Inc.
14830 Archwood St. Unit A
Van Nuys, CA 91405
License # 903894

Invoice

Date 3/11/2021
Invoice # 8114

Bill To
Jonathan

Ship To

P.O. #
Terms

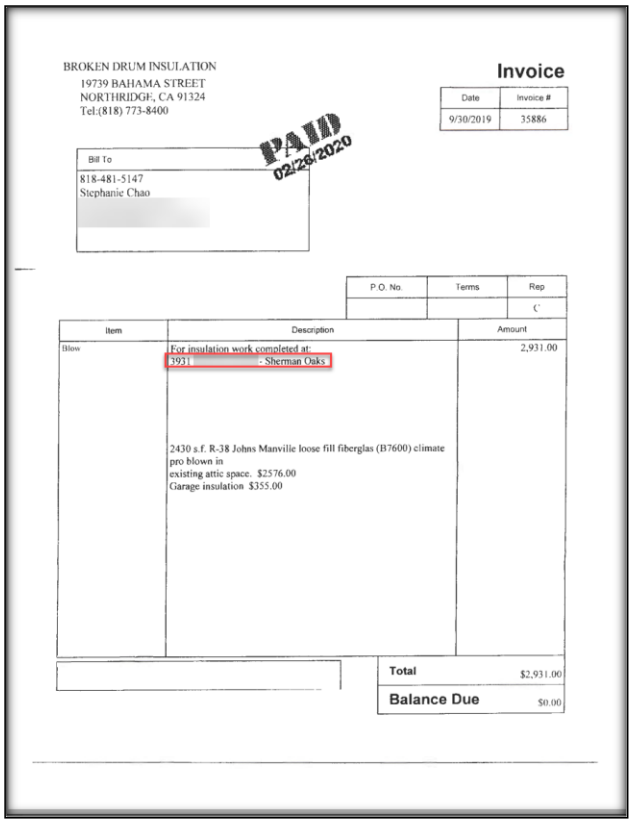
Ship Date 3/11/2021
Due Date 3/11/2021
Other

Item	Description	Qty	Price	Amount
materials	Tankless water heater Navien NPE-240A x 2		3,737.57	3,737.57
	Job location: 10330 Los Angeles, CA 90025			

PAID IN FULL

Subtotal	$3,737.57
Sales Tax (0.0%)	$0.00
Total	$3,737.57
Payments/Credits	$0.00
Balance Due	$3,737.57

Yossef Luzon Inc.
danayossi@yahoo.com
818-339-5640/1
818-780-2370



BROKEN DRUM INSULATION
19739 BAHAMA STREET
NORTHRIDGE, CA 91324
Tel:(818) 773-8400

Invoice

Date	Invoice #
9/30/2019	35886

PAID 02/26/2020

Bill To
818-481-5147
Stephanie Chao

P.O. No.	Terms	Rep
		C

Item	Description	Amount
Blow	For insulation work completed at: 3931 - Sherman Oaks 2430 s.f. R-38 Johns Manville loose fill fiberglas (B7600) climate pro blown in existing attic space. $2576.00 Garage insulation $355.00	2,931.00

Total	$2,931.00
Balance Due	$0.00

Frequently Asked Questions

What is a Double Dip?

- A customer's application is said to have a "double dip" when the customer has received a rebate for the same measure, under the same premise, within 5 years not only through REEP, but also through other residential programs. If double dip is found, the application will be disqualified. **[This is an internal rule and will not be shared with customers**]
 - There are times when customers apply for a rebate however the exact 5 years have not passed. It is okay to proceed with the application as you can go by the year of submission and not the exact date.
- Therm kits are 3 years.

If there is a scenario where a previous customer received a rebate for a TWH (as seen in the Double Dip) and a new customer (New Account #) is applying for a TWH at the same premise, are they eligible?

- Yes, we can accept those applications and process them
- However, just like with regular TWH rebates, if we see actual proof on an invoice that states a TWH was removed, then we are forced to DNQ, as it does not meet the product specifications.

What is needed for Furnaces (Mail in Application)?

- Licensed Contractor Box at bottom of application box MUST be checked by contractor and customer for Furnaces ONLY.
- Contactors must also sign, date, and provide permit number in Section 4. If Contractor, does not include a date it is okay to proceed if customer included a signed date.
- If the customer has provided a proof of permit closure, but did not check the box, it is okay to proceed with the application.

Where can the signature be placed?

- Mail in Application signature **MUST ALWAYS** be on the signature line. If anywhere else, please place ON HOLD – Application Missing Signature and send back to customer to have them resign in the proper location or electronically sign by accepting T/C's through check consolidated link.

When is typed signature acceptable?

- Payee is the account holder
- When the payee is going to a 3rd party, then the attachment MUST be sent from account holder's email.

What are acceptable forms of Proof of Ownership?

- Homeowners Insurance
- Deed
- Mortgage payment
- Tax bill
- We **CANNOT** accept rental agreements

WHERE CAN WE VERIFY ELIGIBILITY OF EQUIPMENT?

- Below is a list of accepted sites for verification of specs:
 - Energy Star: https://www.energystar.gov/productfinder/
 - CEC: https://cacertappliances.energy.ca.gov/Pages/ApplianceSearch.aspx
 - AHRI: https://www.ahridirectory.org/Search/SearchHome?ReturnUrl=%2f
 - DOE: https://www.regulations.doe.gov/certification-data/#q=Product_Group_s%3A*
 - Canadian (Fireplace Inserts ONLY): https://oee.nrcan.gc.ca/pml-lmp/index.cfm?action=app.welcome-bienvenue#searchResults
 - Manufacturing company: Acceptable if you cannot find specs from any of the sites above, BUT it needs PA approval so they can ask engineering. Please send to Processing and QA Team Leads on how to proceed.

IS THE TAX INFORMATION NECESSARY ON THE ONLINE/MAIL IN APPLICATION?

- If the payee is someone other than the account holder, we ALWAYS need the tax information.
 - Verify first that the name in the payee section is not on the account through spouse/CSA
 - If we do not have it then, INC the application.

IS RETAILER INFORMATION NECESSARY?

- Yes, retailer information **MUST** be on the invoice.
- For store receipts if you can tell what store it is from no need to INC.
- If receipt is from Retailer, Retailer name only is sufficient
- If receipt/invoice is from a Contractor, invoice must contain one of the combinations below:
 - Contractor name and phone number
 - Contractor name and address
 - Contractor name and email

WHEN ARE ITEMIZED RECEIPTS NECESSARY?

- Store receipts will be itemized
- Contractor receipts do not need to be itemized and can be a total price

WHEN ARE INSPECTIONS NECESSARY?

- When 2 or more of the same measures are installed at the same address

WHEN WILL YOU NOTATE?

- DD and model # verified. (Absolute **MUST** if complete)
- When adding spec sheets from approved websites when you do not get a green check mark from EECP
- Anytime you deviate from the original procedures (used a different date, updated address, etc)
- For TLR
- Account not in EECP/Lookups
- When signee is listed as spouse on the account
- When application is an INC or DNQ
- To cross reference enrollments
- When you call a customer or business to confirm information

When are handwritten/typed notes acceptable?

- Handwritten notes on typed invoices are acceptable
- Typed notes on written invoices are acceptable

Does the serial number for TWH need to be on the invoice?

- For mail in applications the serial # MUST be on either the invoice, picture (model plate, sticker, box), or the application for TWH as it is a requirement in EECP. If no serial # is provided, the customer MUST be DNQ and asked to resubmit the serial number.
- For online/mobile applications, the processors will verify there is a serial # provided by the customer in EECP. For these applications ONLY, the serial number can be provided by the customer and it does not have to be on the invoice or in a picture (model plate, sticker, box).

What application should the customer fill out if purchases in one year but installed in another?

- The customer should fill out the application based on the year they installed. For example, customer purchased in 2021 but installed in 2022; they should fill out the 2022 application. As always, pricing is based on their purchase date.

When are SWH's that are Not EStar Certified going to be accepted?

- Continue to accept if purchased before 06/30/2021 until 02/15/2022. Notate SWH - (enter UEF of SWH) UEF high draw
- If purchased after 06/30/2021, then it is a DNQ

What do you do when the account holder is deceased?

- Customer would call the CCC and request that the account be put in their name due to the deceased customer. Processors can ask for a check reissuance and change the account once it is changed in CIS.

How should we handle an application where the customer would like us to hold their rebate check?

- Process the rebate application using the account holder's name and default mailing address. Immediately after processing, notify the Initiate Payment Team Lead and the Initiate Payment Processor to cancel the check after issuing the rebate. This will allow the processing team to create a check reissuance workflow and reissue a second check at a later date at the customer's discretion. Notify the customer they will have 30 days to call us back with a new payee address. If they do not call us back within 30 days, we cannot guarantee that the check can be re-issued if the program year has run out of funds.
- **Note:** If you are speaking to the customer about this issue over the phone, notify them over the phone, send a follow up email with that statement, and note the enrollment/attach email notification. If you are communicating with the customer through email, notify the customer through email and attach the email notification/note enrollment. We can use this to fall back on later if a situation like the one below happens again.

What do we do when we discover an item has been returned/cancelled?

- The customer will be sent to inspection and a mandatory vimotely inspection will be done, regardless of the photo being geotagged or not

- The inspection team **MUST** verify the equipment and model number to determine eligibility.

DO WE ACCEPT PARTIAL PAYMENTS?

- Acceptable if it covers the amount of the rebate.
- Financing is also acceptable

WHAT DO WE DO WITH MOBILE HOME PARK CUSTOMERS?

- It is preferred for them to apply through the Mail in Application, but if they apply through the mobile, we **MUST** request signed application by the property owner with mobile home park account number.

HOW LONG WILL 2020 MAIL IN APPLICATIONS BE ACCEPTABLE FOR 2021 PURCHASES?

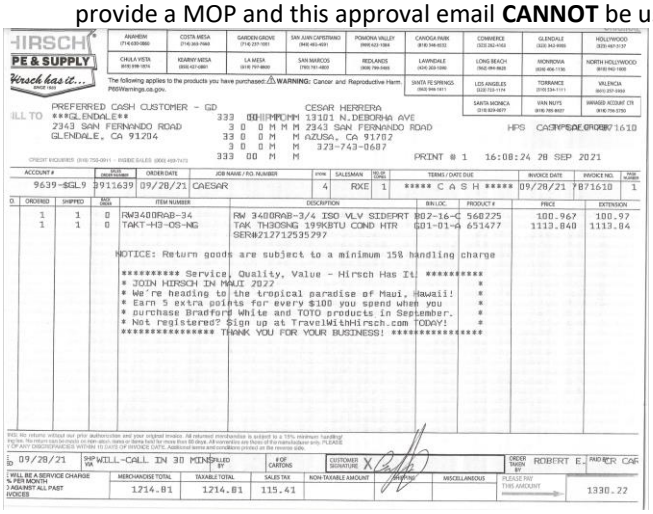
- They **MUST** sign the 2021 application, email customer and ask them to sign the correct application.

ARE PICTURES FOR MODEL NUMBERS ACCEPTABLE WHEN THE INVOICE LISTS ONLY A MANUFACTURER AND NOT THE MODEL NUMBER?

- It is acceptable for all measures even if the manufacturer is not on the invoice as long as the Processor is able to identify who the manufacturer is by searching the model #. If not, reach out to the customer to confirm manufacturer.
- Model numbers can be located on the box, sticker, unit, CF2R

ARE APPROVAL EMAILS ACCEPTABLE?

- Yes, the approval email is to **ONLY** be used for this type of Hirsch Invoice. All other Hirsch invoices **MUST** provide a MOP and this approval email **CANNOT** be used.


HIRSCH
PE & SUPPLY
Hirsch has it...

PREFERRED CASH CUSTOMER - GD
***GLENDALE**
2343 SAN FERNANDO ROAD
GLENDALE, CA 91204

CESAR HERRERA
13101 N.DEBORHA AVE
2343 SAN FERNANDO ROAD
AZUSA, CA 91702
323-743-0687

PRINT # 1 16:08:24 28 SEP 2021

ACCOUNT #	ORDER DATE	JOB NAME / PO. NUMBER	SLSMN	SALESMAN	TERMS / DATE DUE	INVOICE DATE	INVOICE NO.
9639-SGL9 3911639	09/28/21	CAESAR	4	RXE 1	***** C A S H *****	09/28/21	7871610 1

O	ORDERED	SHIPPED	ITEM NUMBER	DESCRIPTION	BIN/LOC	PRODUCT #	PRICE	EXTENSION
	1	1	RW3400RAB-34	RW 3400RAB-3/4 ISO VLV SIDEPRT	B02-16-C	568225	100.967	100.97
	1	1	TAKT-H3-OS-NG	TAK TH3OSNG 199KBTU COND HTR SERN#212712535797	G01-01-A	651477	1113.840	1113.84

NOTICE: Return goods are subject to a minimum 15% handling charge

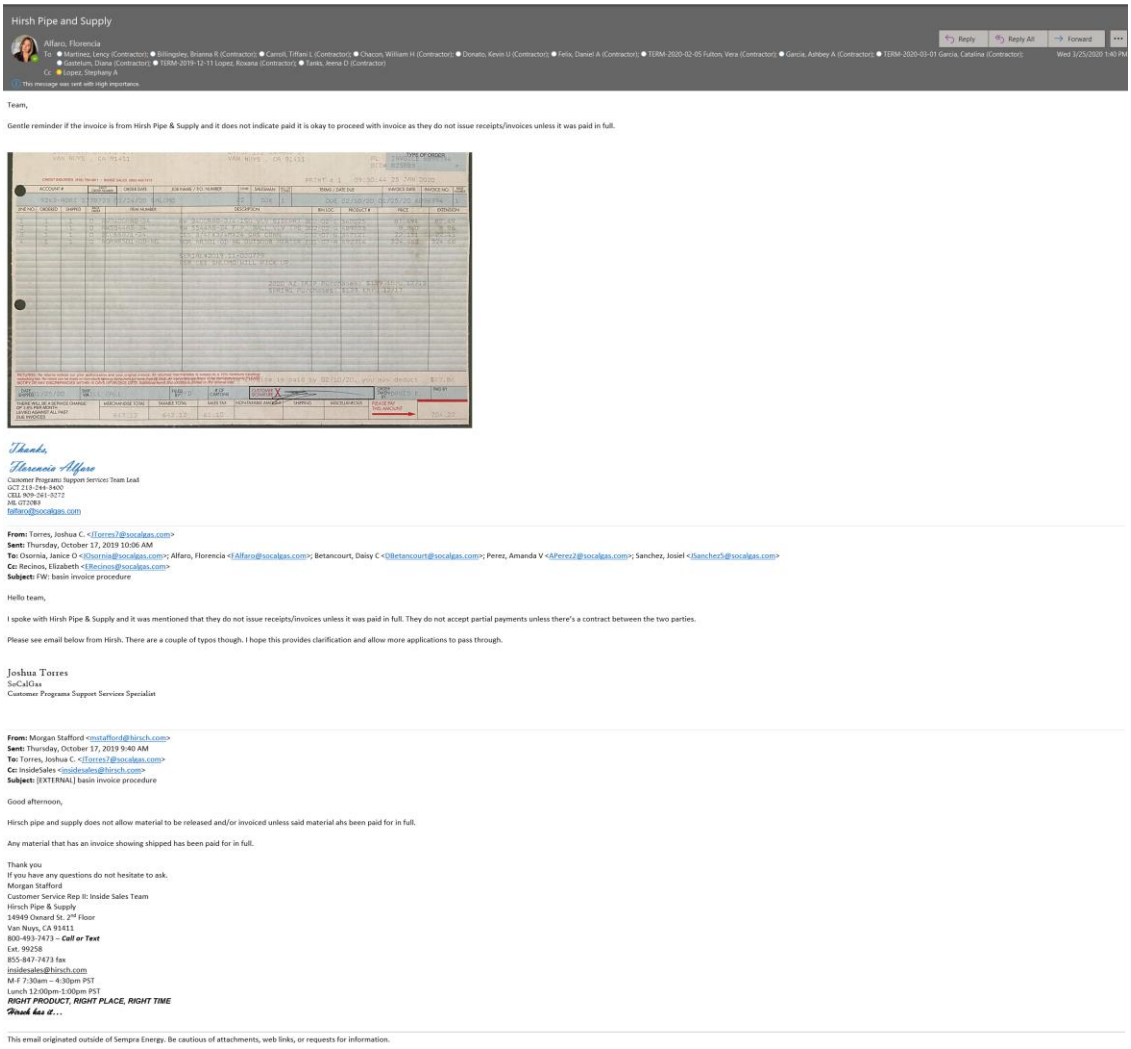
********** Service, Quality, Value - Hirsch Has It! **********
* JOIN HIRSCH IN MAUI 2022 *
* We're heading to the tropical paradise of Maui, Hawaii! *
* Earn 5 extra points for every $100 you spend when you *
* purchase Bradford White and TOTO products in September. *
* Not registered? Sign up at TravelWithHirsch.com TODAY! *
********** THANK YOU FOR YOUR BUSINESS! **********

09/28/21 WILL-CALL IN 30 MINS 0 CARTONS ROBERT E.

MERCHANDISE TOTAL	TAXABLE TOTAL	SALES TAX	NON-TAXABLE AMOUNT	SHIPPING	MISCELLANEOUS	THIS AMOUNT
1214.81	1214.81	115.41				1330.22

Approval to Accept Hirsch invoices.msg

- Hirsch Approval Email **effective 01/14/2022** will no longer need to be added. A note **MUST** be put stating "Hirsch invoice verified."



Hirsh Pipe and Supply

Alfaro, Florencia

Reply Reply All Forward

Wed 3/25/2020 1:40 PM

Team,

Gentle reminder if the invoice is from Hirsh Pipe & Supply and it does not indicate paid it is okay to proceed with invoice as they do not issue receipts/invoices unless it was paid in full.

Thanks,

Florencia Alfaro

Customer Programs Support Services Team Lead

GCT 213-244-3400

CELL 909-261-5272

MIL GT20B9

falfaro@socalgas.com

From: Torres, Joshua C. <JTorres7@socalgas.com>
Sent: Thursday, October 17, 2019 10:06 AM
To: Osornia, Janice O <JOsornia@socalgas.com>; Alfaro, Florencia <FAlfaro@socalgas.com>; Betancourt, Daisy C <DBetancourt@socalgas.com>; Perez, Amanda V <APerez2@socalgas.com>; Sanchez, Josiel <JSanchez5@socalgas.com>
Cc: Recinos, Elizabeth <ERecinos@socalgas.com>
Subject: FW: basin invoice procedure

Hello team,

I spoke with Hirsh Pipe & Supply and it was mentioned that they do not issue receipts/invoices unless it was paid in full. They do not accept partial payments unless there's a contract between the two parties.

Please see email below from Hirsh. There are a couple of typos though. I hope this provides clarification and allow more applications to pass through.

Joshua Torres
SoCalGas
Customer Programs Support Services Specialist

From: Morgan Stafford <mstafford@hirsch.com>
Sent: Thursday, October 17, 2019 9:40 AM
To: Torres, Joshua C. <JTorres7@socalgas.com>
Cc: InsideSales <insidesales@hirsch.com>
Subject: [EXTERNAL] basin invoice procedure

Good afternoon,

Hirsch pipe and supply does not allow material to be released and/or invoiced unless said material ahs been paid for in full.

Any material that has an invoice showing shipped has been paid for in full.

Thank you
If you have any questions do not hesitate to ask.
Morgan Stafford
Customer Service Rep II: Inside Sales Team
Hirsch Pipe & Supply
14949 Oxnard St. 2nd Floor
Van Nuys, CA 91411
800-493-7473 – ***Call or Text***
Ext. 99258
855-847-7473 fax
insidesales@hirsch.com
M-F 7:30am – 4:30pm PST
Lunch 12:00pm-1:00pm PST
RIGHT PRODUCT, RIGHT PLACE, RIGHT TIME
Hirsch has it…

This email originated outside of Sempra Energy. Be cautious of attachments, web links, or requests for information.

Is C.O.D. or Cash Sale acceptable for MOP?

- C.O.D. is accepted as proof of purchase provided C.O.D. invoice is accompanied by a delivery receipt, or an install date is noted on the invoice. If not, reach out to customer to provide updated invoice and or missing delivery receipt.
- Cash Sale is acceptable if "Paid" stamp, balance of 0, or amount paid covers the amount of the rebate. If not, reach out to customer to request updated invoice.

If a Customer goes from an Electric Model to a Gas Model, is that acceptable?

- It is not something we want to solicit to the customer, but it is acceptable for a customer to go from an electric to gas model. It just must meet the program requirements.

Is the Application Page 2 (Product Page) required?

- No, it is okay to proceed if the invoice is 100% complete and Application Page 1 is completed. If the invoice is incomplete, send the correct INC email.

ARE 2020 PURCHASE DATES STILL ACCEPTED?

- Please reference the table below:

Application	Status	Submittal date	Action
2020 Purchase Date	On Hold	Before 07/1/2021	Call/Contact customer and allow up to 7/31/2021 to re-submit missing information If customer does not resubmit with needed information application will be DNQ'd on 8/1/2021
2020 Purchase Date	New	Before 07/01/2021	Okay to proceed if application is complete otherwise DNQ
2020 Purchase Date	New	On or After 07/01/2021	DNQ
2020 Purchase Date	Resubmission	On or After 07/01/2021	DNQ, will no longer be accepted

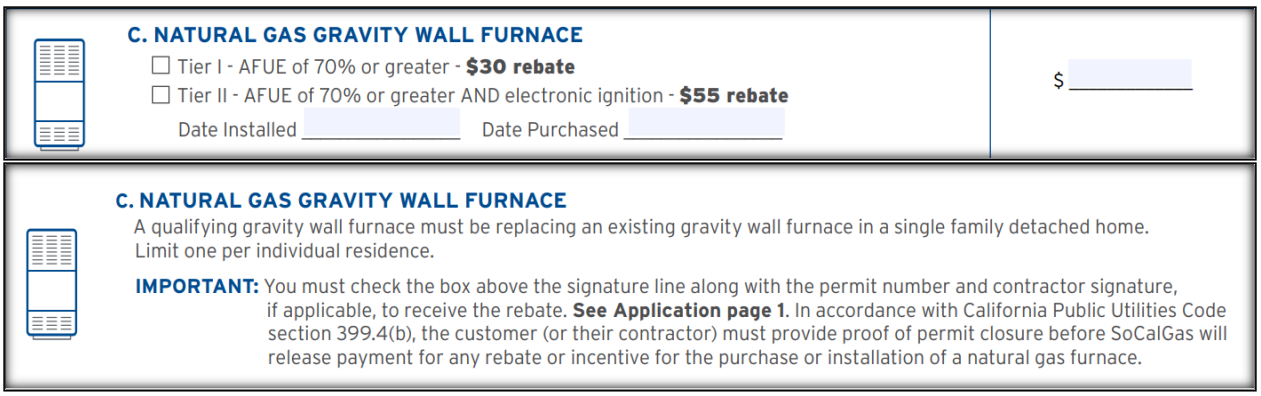
ACCEPTABLE FORMS OF SHORTHAND

- MOP – Method of Payment
- INC – Incomplete
- DNQ – Does not qualify
- DQ – Disqualified
- PIF – Paid in Full
- POP – Proof of Purchase
- ID – Installation Date
- PD – Purchase Date
- CX – Customer
- POO – Proof of Ownership
- CD – Clothes Dryer
- TWH – Tankless Water Heater
- SWH – Storage Water Heater
- PH – Pool Heater
- NGF – Natural Gas Furnace
- FI – Fireplace Insert
- QA – Quality Assurance
- IP – Initiate Payment
- JCS – Job Cost Summary
- WF – Workflow
- RWF – Reopened Workflow
- APP – Application

DISCONTINUED MEASURES AND PROGRAMS

GRAVITY WALL FURNACES

Gravity Wall Furnace specifications and rebate amounts as shown in application (Discontinued effective 07/01/2021):

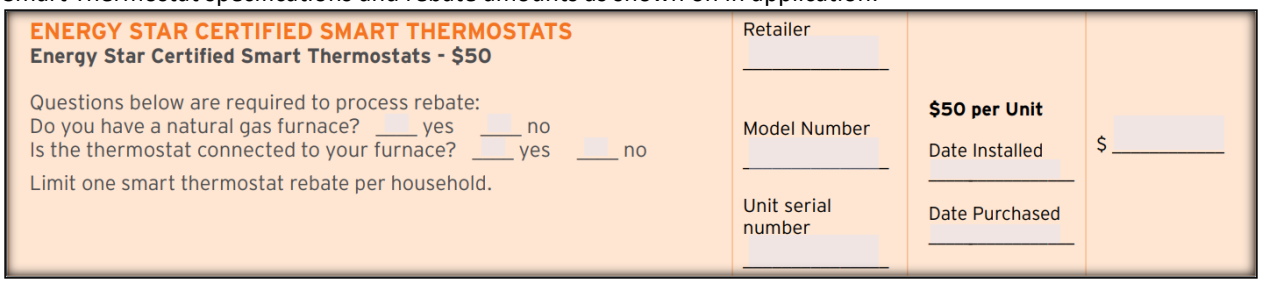


Note: Gravity Wall Furnaces MUST be replacing an existing gravity wall furnace. Any Williams Furnaces purchases MUST be DQ'd as they are part of our POS program. Additionally, ALL qualifying gravity wall furnaces manufactured by William's Furnaces are rebated as part of SCG's Residential HVAC Upstream program and do not qualify for mail in rebates, regardless of vendor

Refer to Natural Gas Furnaces for other requirements as these will only come in through mail in applications.

SMART THERMOSTAT

Smart Thermostat specifications and rebate amounts as shown on in application:

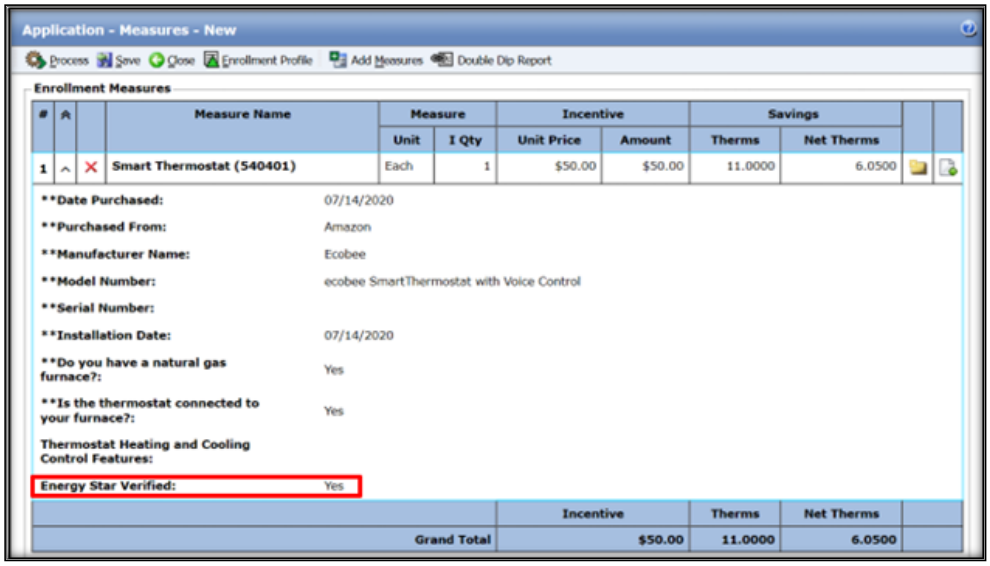


Note the following:

- Limit **one** rebate per residence.
- *Customer **MUST** have a **natural gas furnace** to be eligible for the rebate. Thermostat **MUST** be connected to your natural gas furnace.*
- Smart thermostats enrolled in the **Southern California Edison (SCE) Save Power Days, PLA – LADWP Program** or other **joint utility smart thermostat programs with SoCalGas**, do not qualify for a mail in or online rebate.
- **Note although Model EcoFactor (Simple S100) is listed on the Energy Star list as a qualifying model, the smart thermostat does not qualify and will be DQ'd.**

If model is not displayed on the Energy Star qualifying list and the "Energy Star Verified" field is not displayed, the smart thermostat may qualify for a rebate depending on the unit's features. Models entered manually, and not Energy Star Certified MUST be validated, with the units specifications uploaded to the enrollment's document workflow.

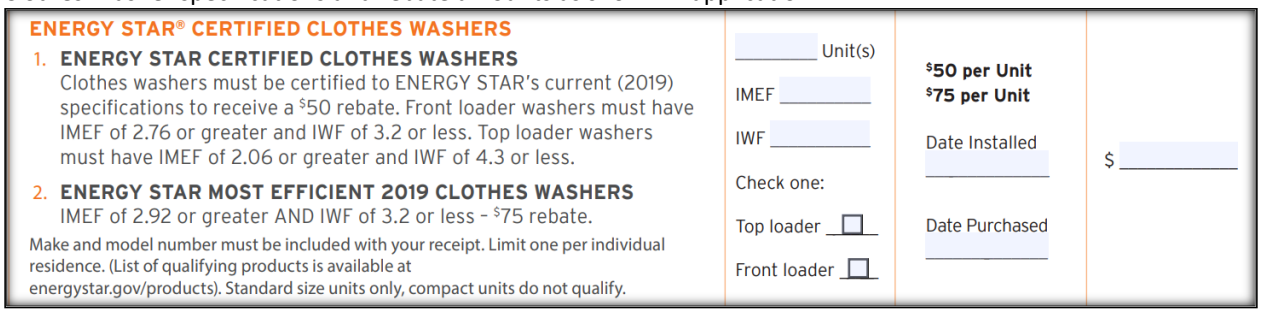
Smart Thermostats, if they are found under the drop down, Energy Star Verified field will display whether they are eligible. If they do display as YES, this is a clear indication that they qualify for a rebate.



Note although model Ecofactor (Simple S100) is listed on the energy star list as a qualifying model, the TSTAT does not qualify and will be a DQ.

CLOTHES WASHERS

Clothes Washer specifications and rebate amounts as shown in application:



CLOTHES WASHER BUNDLE (CWB)

Clothes Washer Bundle specifications and rebate amounts as shown in application: Please **note**, to qualify customers **MUST** purchase a **qualifying Clothes Dryer** to receive a rebate. Additonally, both units **MUST** be displayed purchased on the same invoice/receipt. **Effective 8/1/2019-12/31/2019.**

ENERGY STAR® CERTIFIED NATURAL GAS DRYER AND ENERGY STAR CERTIFIED CLOTHES WASHER SET **1. ENERGY STAR CERTIFIED NATURAL GAS DRYER AND ENERGY STAR CERTIFIED CLOTHES WASHER** Front loader washers must have IMEF of 2.76 or greater and IWF of 3.2 or less. Top loader washers must have IMEF of 2.06 or greater and IWF of 4.3 or less. Must be combined with an ENERGY STAR Certified Natural Gas Dryer. **2. ENERGY STAR CERTIFIED NATURAL GAS DRYER AND ENERGY STAR MOST EFFICIENT 2019 CLOTHES WASHER** Clothes washers must have an IMEF of 2.92 or greater AND IWF of 3.2 or less to receive a $125 rebate. Must be combined with an ENERGY STAR Certified Natural Gas Dryer. Make and model number must be included with your receipt. Qualifying clothes washer and natural gas dryer must be purchased at the same time. (List of qualifying products is available at energystar.gov/products). Standard size units only, compact units do not qualify. Stand-alone clothes washer rebate no longer available after August 1, 2019. Limit one set per household.	_____ Unit(s) IMEF _____ IWF _____ Check one: Top loader ☐ Front loader ☐	**$100 per Set** **$125 per Set** Date Installed _____ Date Purchased _____	$ _____

ATTIC INSULATION

Attic Insulation specifications and rebate amounts as shown in application:

ATTIC INSULATION Attic insulation is eligible for an incentive only if 1) the pre-retrofit insulation level is R-11 or less and 2) there is at least a 24 inch clearance between top of ceiling joist and bottom of ridge board. In addition, the final insulation level must be at least R-38 unless a higher level is specified by local jurisdiction. Attic insulation is feasible only when the attic crawl space is adequate. At the highest peak, clearance between the bottom of the roof rafters and the top of the ceiling joists must be at least 24 inches. If sufficient space is not available for R-38, the final retrofit level must be at least R-19. Garages and other non-living areas do not qualify. Your rebate is based on the amount of insulation actually installed.	_____ Sq. Ft. Final R-value _____	**$0.15 per Sq. Ft.** Date Installed _____ Date Purchased _____	$ _____

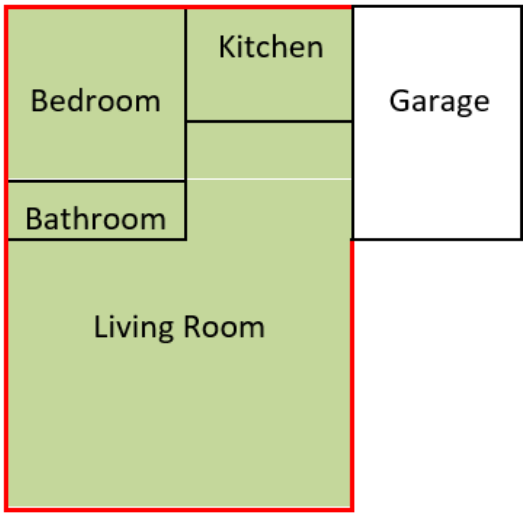
Only living condition space qualifies for attic insulation. (See diagram below; only area in green qualifies for rebate). Kitchens qualify as living space. Knee Wall insulation qualifies if it's part of the living space. Batt (fiberglass) insulation and blown-in insulation are accepted through the PLA application. At this time, it does not support radiant barrier insulation.
Customer provided invoice/receipt MUST show

- square footage
- R-value
- location of installation

The exact amount of installed insulation is required. Approximate square feet measurements are not acceptable. Remember to round up If the square feet amount provided is provided with a decimal point when entering it into EECP. (ex: 1,250.5 feet of insulation will be entered as 1,251). The square feet of the amount of insulation installed will be provided on the measure's page of the application; however if this information is missing we can take the square footage information from the invoice. In the instance that multiple R-values for the same kind of insulation are provided, please enter the highest. Process without splitting the insulation per R-Values. That is, we can still update the R-Value, dates and square feet for accuracy. But never split the same kind of insulation (attic or wall insulation) according to R-values. It has come to light that splitting the insulation per R-Value could result in higher inspection rates and cause further issues when RHA enters inspection results in EECP.
If the invoice states the address of the job, then this address MUST match the installation address on the application. If not provided, it's not required. Invoices at times show the attic insulation as part of an Attic Improvement project. This is acceptable; that is, as long as the insulation installation is linked to the attic area as shown in an invoice, we can accept the invoice. See sample below.

Item	Description	Unit Cost ($)	Quantity	Price ($)
Attic Cleaning & Decontamination	Remove any potentially contaminated materials from attic. Rodent proofing against roof rats with wire mesh. Spray EnviroCon anti microbial disinfectant on floor joists . Air seal attic with polyurethane foam to prevent air leaks into the house.	0.50	2076	1,038.00
R38 Batts	Lay Down Johns Manville R38 Batts insulation.	1.40	2076	2,906.40
Asbestos Abatement	1) MAKE PROPER NOTIFICATIONS REQUIRED BY LAW (OSHA,EPA, S.C.A.Q.M.D.) 2) ISOLATION OF WORK AREAS WITH 6ML. VISQUEEN INCLUDING CRITICAL BARRIERS 3) ESTABLISH 3 STAGE DECONTAMINATION CHAMBERS UTILIZATION OF PRESSURE DIFFERENTIAL AIR FILTRATION	650.00	1	650.00

NOTE: It is best practice to contact the contractor first whenever information is missing on the invoice.
Attic insulation may at times be referred to as ceiling insulation. They are not the same. The industry uses the words interchangeably. If the R rating is between 19 and 30, it is attic insulation. A ceiling does not have enough clearance for such high R ratings. Ceiling insulation does not qualify for our PLA rebate however, cathedral/vaulted ceiling insulation qualifies for Wall Insulation rebate as long as it is directly above living conditioned space (pitched roof can be seen above you when inside the home). Cathedral ceilings will be treated as wall insulation with minimum of R-13 for space that is exposed and directly above living space.



Roof rafter, LTTR insulation (Long term thermal insulation is roofing material that goes outside of the house), radiant barrier, ceiling insulation, and garage space insulation **DOES NOT QUALIFY** for PLA rebates program. **Attic floor insulation: if the invoice indicates it is for "Attic Floor Insulation" it is okay to proceed. If the invoice only indicates "Floor Insulation" you will need to call the customer/contractor for further clarification or DNQ.**
See Example below:

Item	Description	Quantity	Rate	Amount
PREPARATION & COMPLETION	PREPARATION & COMPLETION	800	0.20	160.00
CLEANING & INSULATION REM	ATTIC CLEANING & INSULATION REMOVAL	800	1.40	1,120.00
INSULATION INSTALLATION	1. AREA OF WORK: 1st floor attic - Attic fl oor 2. SCOPE OF WORK: - Supply and install Ce rtainTeed Sustainable unfaced fiberglass batt Insulation to cover attic floor space between joist-bays: R-Value: R-38 - 10 inches. Manufacturer product number :990455 Width: 16" on c enter. 800SF	800	2.20	1,760.00
INSULATION INSTALLATION	1. AREA OF WORK: - storage space attic 2. SCOPE OF WORK: - Supply and install Ce rtainTeed R19 unfaced fiberglass batts insulation to cover interior cavity space between joists at 16 IOC - apply hanger wires to secure	660	1.80	1,188.00

If self-installed insulation:

1. Processor MUST go to the retailer website and search the SKU number and obtain the coverage area for the item purchased.
2. Processor MUST conduct calculations on the total amount of insulation purchased

If contractor installed - No need for prequalification

INSPECTIONS

All self-installed insulation resulting on a rebate amount greater than $50 MUST go to inspection. Inspection notes MUST state that the insulation was self-installed and that the sqft, R-value, and location of installation (attic or wall) MUST be verified.

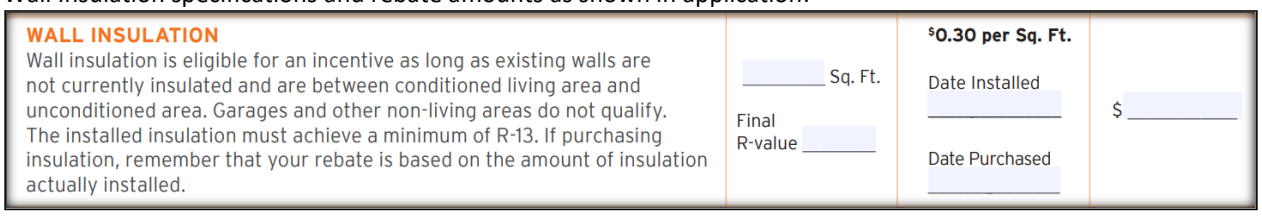
On occasion, RHA may verify a different square footage or R-value for the installed insulation, the Application Workflow does not need to be reopened or updated to match the inspection results. This will be fixed in the Correction Workflow.

ALL applications with **EVERGUARD** and **GUARDIAN** invoices MUST go to inspection prior to payment.

NOTE: R.E.S or Renewable Energy Services invoice is received, and the payee is set to R.E.S., processor MUST call the customer to verify payee. If customer approves R.E.S. as payee, proceed to process as usual and enter notes in EECP about the call. If the customer does not approve R.E.S as the payee, enrollment MUST be cancelled as DQ and a DQ letter is to be sent to R.E.S. Customer can then submit new application packet along with an invoice so that the rebate can be processed under their name. If the customer does not provide response, see Team Lead.

WALL INSULATION

Wall Insulation specifications and rebate amounts as shown in application:



WALL INSULATION

Wall insulation is eligible for an incentive as long as existing walls are not currently insulated and are between conditioned living area and unconditioned area. Garages and other non-living areas do not qualify. The installed insulation must achieve a minimum of R-13. If purchasing insulation, remember that your rebate is based on the amount of insulation actually installed.

_____ Sq. Ft.

Final R-value _____

$0.30 per Sq. Ft.

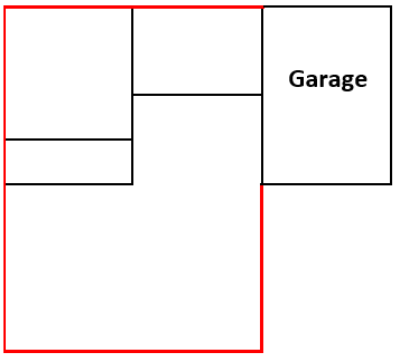
Date Installed _____

Date Purchased _____

$ _____

Please note, guidelines for attic and wall insulation are similar. Please refer to Attic Insulation guidelines except for the following:

Interior wall insulation does not qualify for PLA rebates; Exterior walls only. See home diagram below; only red walls qualify:



INSPECTIONS

All self-installed insulation resulting on a rebate amount greater than $50 MUST go to inspection. Inspection notes MUST state that the insulation was self-installed and that the sqft, R-value, and location of installation (attic or wall) MUST be verified.

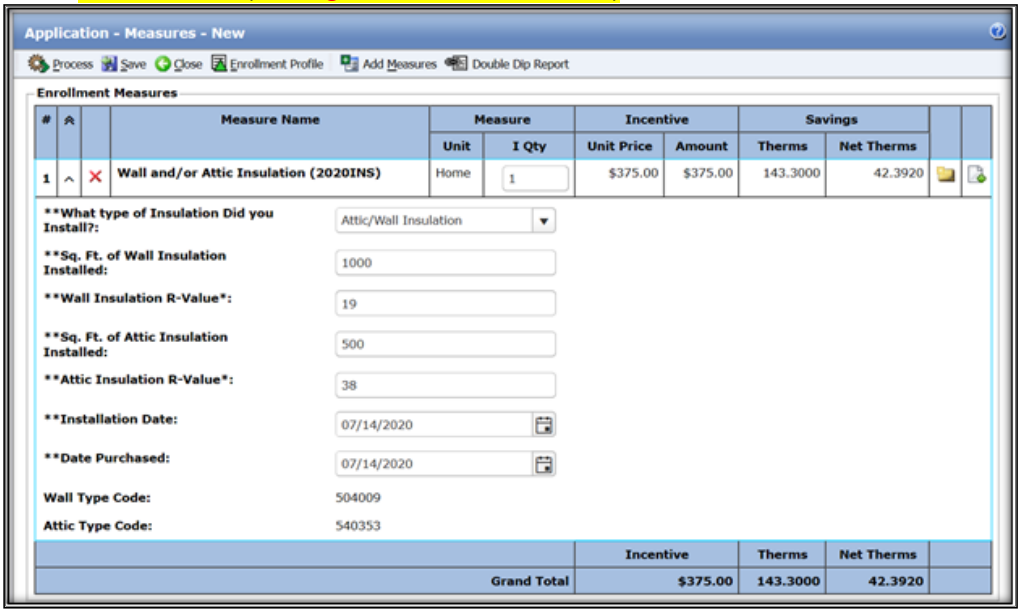
On occasion, RHA may verify a different square footage or R-value for the installed insulation, the Application Workflow does not need to be reopened or updated to match the inspection results. This will be fixed in the Correction Workflow.

ALL applications with **EVERGUARD** and **GUARDIAN** invoices MUST go to inspection prior to payment.

NOTE: R.E.S or Renewable Energy Services invoice is received, and the payee is set to R.E.S., processor MUST call the customer to verify payee. If customer approves R.E.S. as payee, proceed to process as usual and enter notes in EECP about the call. If the customer does not approve R.E.S as the payee, enrollment MUST be cancelled as DQ and a DQ letter is to be sent to R.E.S. Customer can then submit new application packet along with an invoice so that the rebate can be processed under their name. If the customer does not provide response, see Team Lead.

The following measures do not have a green checkmark or dropdown list:

- Attic Insulation (No longer offered as of 7/1/2020)
- Wall Insulation (No longer offered as of 7/1/2020)



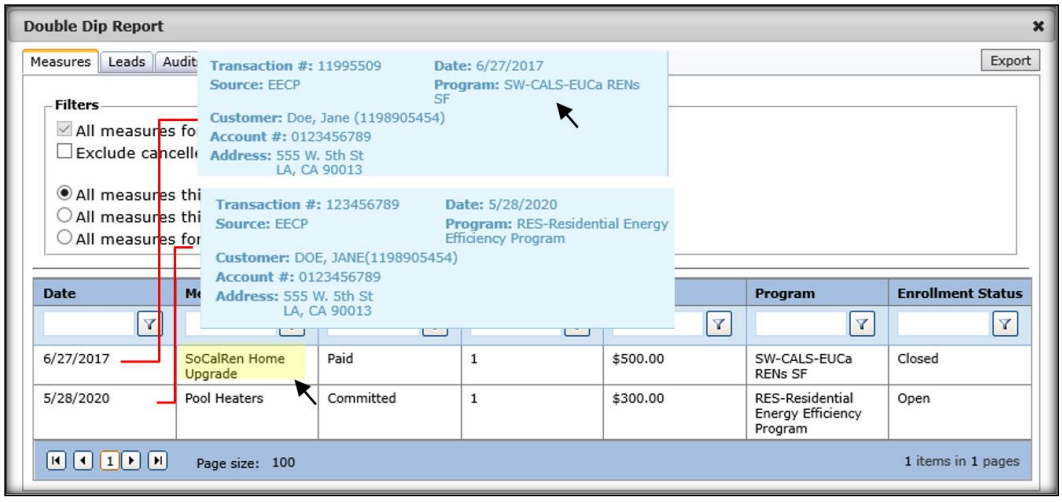
DOUBLE DIP TABLE

Program 1	Program 2	Double Dip?	Payment
REEP	RESHVAC Upstream	No	Pay both. REEP will claim zero savings. See the **Res HVAC Upstream Double Dip Detection** section below for processing example.
REEP	RESHVAC QI	No	Pay both.
REEP	RESHVAC QM	No	Pay both.
REEP	RESHVAC QC	No	Pay both.
REEP	EUCA REN	Yes	First come first served. Pay only one.
REEP	EUCA	Yes	First come first served. Pay only one.
RESHVAC QI	EUCA	Yes	First come first served. Pay only one.
RESHVAC QM	EUCA	No	Pay both.
REEP	SCE Save Power Days	Yes	First come first served. Pay only one.
Nest Rush Hour Rewards (DR)	REEP - LADWP	No	Pay both
REEP	Smart Thermostat	No	Pay both
Ecobee	REEP – LADWP	No	Pay both
REEP	REEP – LADWP	Yes	First come first served. Pay only one.
ESA	ESA	Yes	First come first served. Pay only one.
HUP-MIDI-SCE (T-STATS)	MIDI	Yes	TSTAT is only one per household.

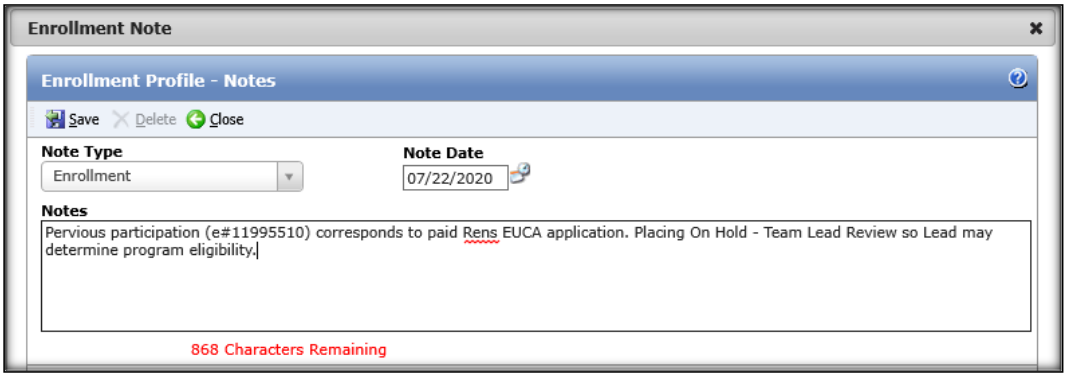
RENS EUCA PROGRAM DOUBLE DIP

Program per PA was sunsetted at the end of 2019.

1. Check for any leads under the **RENS EUCA** program for the same account, within the last 5 years:



1.1. If there is a lead for the **RENS EUCA** program within the last 5 years, The processors will place the enrollment **On Hold – Team Lead Review** and note in the **Notes** workflow that the enrollment has a lead for the **RENs EUCA** program:



- When the inquiry is completed, the enrollment will be placed **On Hold – Team Lead Review** with instructions in the **Notes** workflow on how to proceed.

1.2. If there are no leads for the **RENS EUCA** program, the application can be processed.

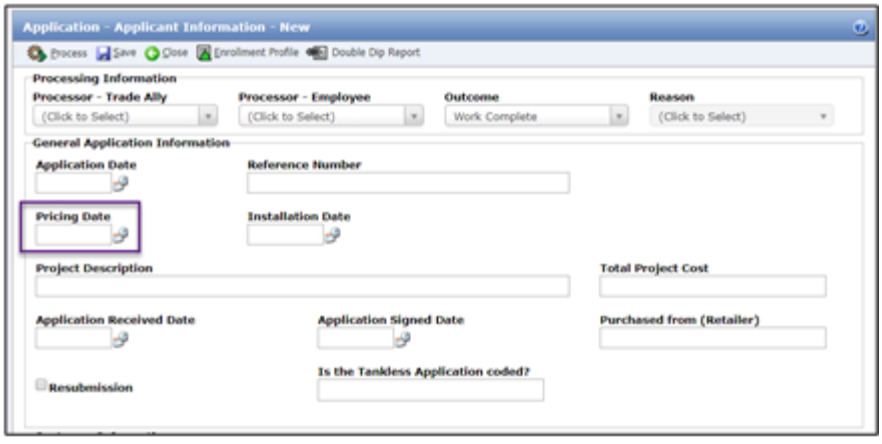
INACTIVE ACCOUNT SCENARIO PROCEDURE & GUIDELINE

INACTIVE Accounts	Scenario	Action	Examples
1. Measure must have been purchased and installed prior to closing date 2. The customer had an active account	Account is now inactive in EECP/CIS - Customer has new active account in CIS (Measure - moves with customer ex. Dryer)	Update the enrollment with the new active customer account in CIS	
	Account is now inactive in EECP/CIS - Customer does not have a new active account in CIS (Measure - moves with customer ex. Dryer)	**Pay applicant under the installation address **new** account number and note the account payment for measure was issued to the previous acccount holder. Use the forwarding address found in CIS as the Alt mailing address. If no Forwarding address is found proceed to using the service address as the Alternative**	12294600
	Account is now inactive in EECP/CIS - Customer has new active account in CIS (Measure - does not move with customer ex. Pool Heater)	Pay applicant under the installation address **new** account number and note the account payment for measure was issued to the previous acccount holder. Use the forwarding address found in CIS as the Alt mailing address. If no Forwarding address is found proceed to using the service address as the Alternative	
	Account is now inactive in EECP/CIS - Customer does not have a new active account in CIS (Measure - does not move with customer ex. Pool Heater)	Pay applicant under the installation address **new** account number and note the account payment for measure was issued to the previous acccount holder. Use the forwarding address found in CIS as the Alt mailing address. If no Forwarding address is found proceed to using the service address as the Alternative	12310612

If your scenario does not fit in with the table above, please reach out to Team Lead on how to proceed.

PRICING DATE (2021 IO)

A new field “Pricing Date” has been added to various programs in EECP. The purpose of this field is to allow flexibility at year-end with charging projects to the next year’s Internal Order (I/O) number. The date entered in this field will drive EECP’s Pricing and Savings schedule for installed measures.



Programs will be configured to select Pricing and Savings Schedules based on the date entered in “Pricing Date” field.

Applications received within a Program Year that are not processed by the Enrollment Cutoff Date (typically March 31st) and were not accrued or encumbered MUST be charged to the next year's I/O. **Please see next section on 2020 end of year applications using 2021 IO.**

If exception to the policy is required, please check with the appropriate management to obtain approval.

The following guidelines will be used **effective January 1st 2021:**

- **Scenario 1: (no longer applicable as funds have been depleted for 2020 purchases)**
 - **Application Received/Postmarked on or Before 12/31/2020**
 - Purchased and Installed in 2020
 - **Pricing Date = Purchased Date**
- **Scenario 2: (no longer applicable as funds have been depleted for 2020 purchases)**
 - **Application Received/Postmarked on or Before 12/31/2020**
 - Purchased 2020
 - Installed 2021
 - **Pricing Date = 1/4/2021**
- **Scenario 3: (no longer applicable as funds have been depleted for 2020 purchases)**
 - **Application Received/Postmarked on or After 1/1/2021**
 - Purchased and Installed 2020
 - **Pricing Date – 1/4/2021**
- **Scenario 4: (no longer applicable as funds have been depleted for 2020 purchases)**
 - **Application Received/Postmarked on or After 1/1/2021**
 - Purchased 2020
 - Installed 2021
 - **Pricing Date = 1/4/2021**
- **Scenario 5:**
 - **Application Received/Postmarked on or After 1/1/2021**
 - Purchased 2021
 - Installed 2021
 - **Pricing Date = Purchased Date**
- **Scenario 6:**
 - **Application Received/Postmarked on or after 7/1/2021 with a 202020 or earlier Purchase Date (e.g. 2019, 2018, etc.) will be disqualified.**

PRICING CHEAT SHEET YEAR 2020 AND 2021

(Measures installed and purchased between September 1st 2020 – December 31st 2020 and submitted on or before December 31st 2020 qualify for 50% Promotional kicker see chart below cheat sheet)

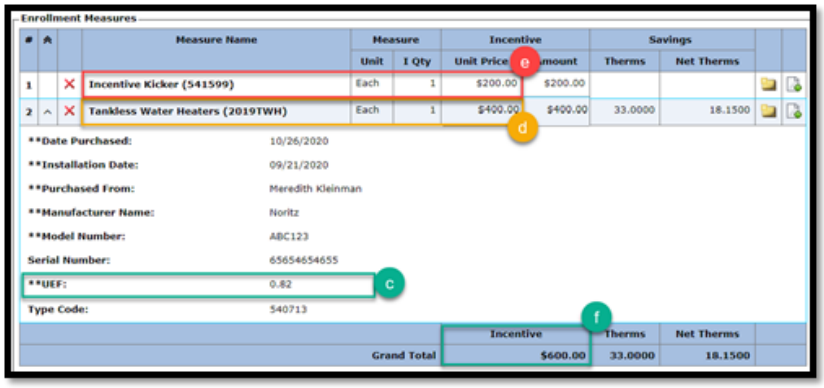
Dryer				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Energy Star	3.48 CEF of greater $50	3.48 CEF or greater $75	3.48 CEF or greater $75	3.48 CEF or greater $70
Fire Insert				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Tier 1	70 - 74.9% $300	70 - 74.9%$300	70 - 74.9% $300	70 -74.9 $300
Tier 2	75% or greater $500	75% or greater $500	75% or greater $500	75% or greater $500
Gravity Wall Furnace				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
	70% or greater AFUE $50	70% or greater AFUE $50	70% or greater AFUE $50	70% or greater AFUE $30
High Efficiency Furnace				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Tier 1	92 - 94% AFUE $150	92 - 94% AFUE $150	92 - 94% AFUE $150	92 - 94% AFUE $115
Tier 2	95% or greater AFUE $400	95% or greater AFUE $400	95 - 96% AFUE $400	95 -96% AFUE $325
Tier 3		97% AFUE or greater $1,000	97% AFUE or greater $1,000	97% AFUE or greater $1,000
Insulation				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Attic	.15 cents per sq ft	N/A	N/A	N/A
Wall	.30 cents per sq ft	N/A	N/A	N/A
Intermittent Pilot Light				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
	$25	$25	$25	$25
Oven (Gas)				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Energy Star	N/A	N/A	$100	$100
Pool Heater				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Tier 1	84 - 89% TE $300	84 - 89% TE $300	84 - 89% TE $300	84 - 89% TE $400
Tier 2	90% or greater $750	90% or greater $750	90% or greater $750	90% or greater $750
Smart Thermostat				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Energy Star	$50	$50	$50	N/A
Storage Water Heater				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Tier 1	UEF.64 - .67 $175	UEF.64 - .67 $175	UEF.64 - .67 $175	UEF.64 - .67 $175
Tier 2	UEF.68 or greater $175	UEF.68 or greater $175	UEF.68 or greater $175	UEF.68 or greater $115
Tankless Water Heater				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
Tier 1	UEF.81 - .86 $400	UEF.81 - .86 $400	UEF.81 - .86 $400	UEF.82 - .86 $600
Tier 2	UEF.87 or greater $600	UEF .87 .94 $600		UEF.87 - .94 $800
Tier 2A			UEF .87 .92 $600	
Tier 2B			UEF .93 - .94 $800	
Tier 3		UEF .95 or greater $1,000	UEF .95 or greater $1000	UEF .95 or greater $1000
Therm Kit				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
	No Incentive	No Incentive	No Incentive	No Incentive
Thermostatic Shower Valve				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
	$7.50	$7.50	$7.50	$7.50
Thermostatic Valve and Shower Head				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
	$15	$15	$15	$15
Tubspout & Thermostatic Shut-off Showehead				
	January 1,2020-June 30, 2020	July 1, 2020 September 30, 2020	October 1, 2020 -December 31, 2020	January 1, 2021 - Current
	$30	$30	$30	$30

2020 Applications w/kickers Processing - Utilizing 2021 IO

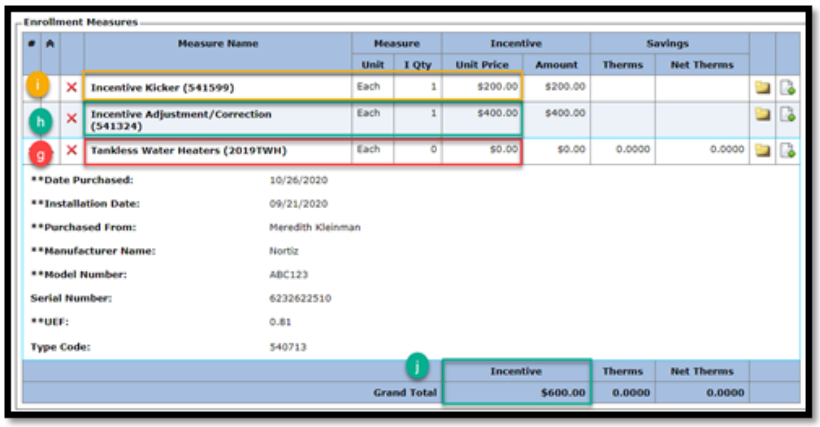
2020 Applications (purchases from 9/1/2020-12/31/2020) which will be paying promotional 50% kicker and utilizing the 2021 IO shall follow the guidelines below.

The following guideline will be used:

- 2020 Application was submitted/post-marked on or before 12/31/2020
- Purchased 2020 (9/1/2020-12/31/2020)
- Installed 2020 (January 2021 install date, okay to proceed)
 a. **Pricing Date 1/4/2021**
- The **"Incentive Kicker"** (541599) measure will be utilized to pay the 50% promotional kicker amount. (see examples A, B & C below)
- Attic/Wall applications will use the "Incentive Adjustment/Correction" Measure to pay the customer as the Attic and Wall Measure will not available in the 2021 pricing schedule for the program.
- Smart Thermostats **will not** need the "Incentive Kicker" price adjustment as the system is correctly capturing the incentive. Please ensure "Pricing Date 1/04/2021" is updated on the Application 'Pricing Date"
- Tankless Water Heaters with a **.81 UEF**
 a. Processor will check TWH's UEF again in AHRI
 b. If UEF has changed from .81 to .82 UEF – collect new spec and attach to documents
 c. Update the UEF on the measure to reflect .82
 d. Verify correct incentive of $400 is displayed
 e. Add "Incentive Kicker" in the amount of $200
 f. Verify total Incentive amount is $600



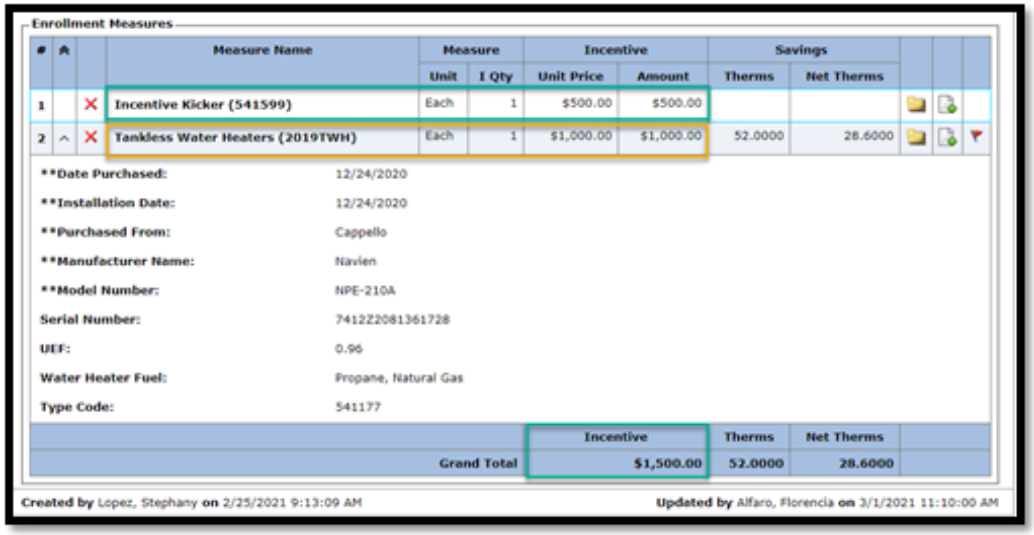
g. If UEF is still listed as .81 in AHRI, "0" out the measure
h. Add the "Incentive Adjustment/Correction" measure for $400
i. Add the "Incentive Kicker" for a total of $200
j. Verify the total incentive is displayed as $600



EXAMPLES

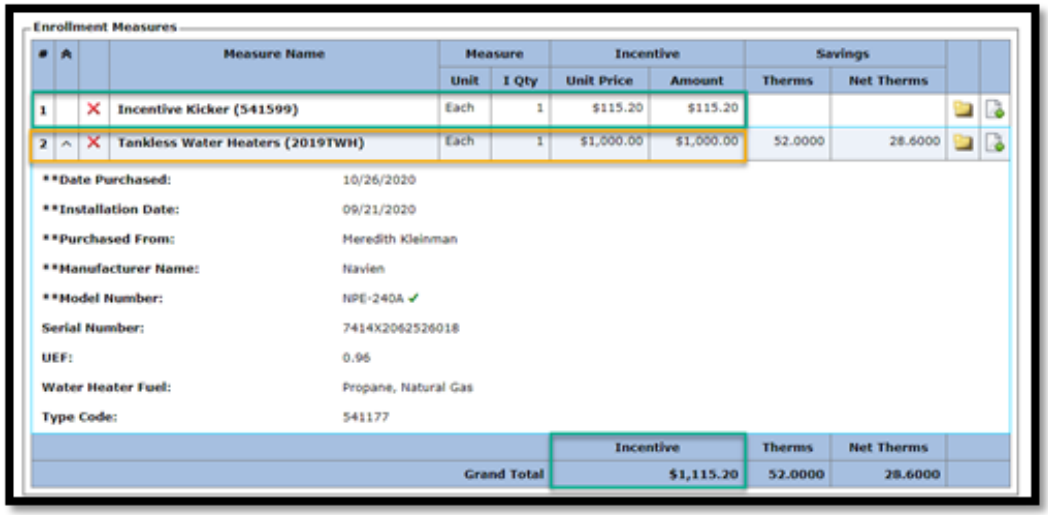
Scenario A:
TWH qualifies for $1,000 (.96 UEF) rebates. Customer also qualifies for the 50% promotional kicker ($500) as TWH was purchased and installed on 12/24/2020 and submitted on or before 12/31/2020. Customer also paid $1,500 or over for TWH purchase price.

- Ensure correct incentive is displayed for the TWH ($1,000)
- Add the "Incentive Kicker" measure ($500)
- Verify incentive amount total is ($1,500)



Scenario B:
TWH qualifies for $1,000 (.96 UEF) rebate. Customer also qualifies for the 50% promotional kicker ($500) as TWH was purchased and installed on 10/26/2020 and submitted on or before 12/31/2020. Customer paid $1,115.20 for TWH purchase price.

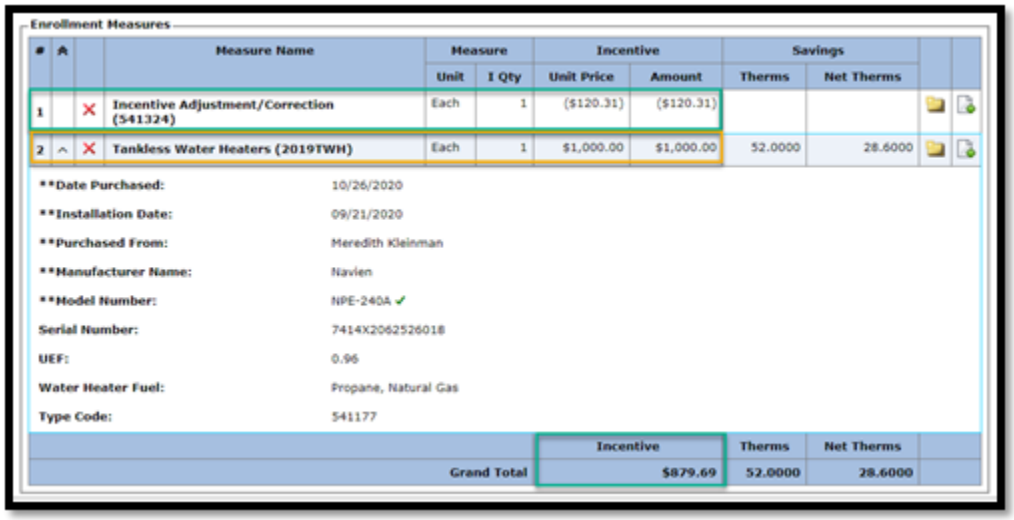
- Ensure correct incentive is displayed for the TWH ($1,000)
- Add the "Incentive Kicker" measure ($115.20)
- Verify incentive amount total is ($1,115.20)



Scenario C:

TWH qualifies for $1,000 (.96 UEF) rebates. Customer also qualifies for the 50% promotional kicker ($500) as TWH was purchased and installed on 10/26/2020 and submitted on or before 12/31/2020. Customer paid $879.69 for TWH purchase price.

- Ensure correct incentive is displayed for the TWH ($1,000)
- Add the "Incentive Adjustment/Correction" measure (-$120.31)
- Verify incentive amount total is ($879.69)



Enrollment Measures

#	A		Measure Name	Measure		Incentive		Savings			
				Unit	I Qty	Unit Price	Amount	Therms	Net Therms		
1		✕	Incentive Adjustment/Correction (541324)	Each	1	($120.31)	($120.31)				
2	^	✕	Tankless Water Heaters (2019TWH)	Each	1	$1,000.00	$1,000.00	52.0000	28.6000		

**Date Purchased:	10/26/2020
**Installation Date:	09/21/2020
**Purchased From:	Meredith Kleinman
**Manufacturer Name:	Navien
**Model Number:	NPE-240A ✓
Serial Number:	7414X2062526018
UEF:	0.96
Water Heater Fuel:	Propane, Natural Gas
Type Code:	541177

	Incentive	Therms	Net Therms
Grand Total	$879.69	52.0000	28.6000

Inspection = Standard Operating Procedures

QA = Verify Pricing Date entered is aligned with qualifying scenario (1-6) as described in the Policy.

Payment Initiation = Verify IO is aligned with Pricing Date entered.

KICKER

Effective 9/1/2020, the Residential incentive amounts were increased by **50%** for **all purchases and installs** made between **9/1/2020-12/31/2020**. See the Appendix for the adjusted incentive amounts.

A "2020 Kicker" field will be displayed for each measure to indicate the amount of the additional incentive.

Effective 01/01/2021, the kicker will no longer be offered for any measures.

50% KICKER TABLE

Use the chart below as a reference of the maximum "Incentive Kicker" amount needed to adjust the total incentive amount.

REEP and REEP Mobile			
Measure	Rebate Amount before 9/1/2020	2020 Additional Kicker Amount	Total Rebate Amount after 9/1/2020
Energy Star Dryer (540355)	$75	$37.50	$112.50
Fire Insert 70%+ FE (540841)	$300	$150	$450
Fire Insert 75%+ FE (540842)	$500	$250	$750
Gravity Wall Furnace 70% (530068)	$50	$25	$75
High Efficiency Furnace AFUE 92% (541070)	$150	$75	$225
High Efficiency Furnace AFUE 95% (541055)	$400	$200	$600
Intermittent Pilot Light (540898)	$25	$12.50	$37.50
Oven (Natural Gas) (Effective 10/01/2020)	$100	$50	$150.00
Pool Heater Tier I 84%-89% TE (540453)	$300	$150	$450
Pool Heater Tier II 90% TE or higher	$750	$375	$1,125
Smart Thermostat (540401)	$50	$25	$75
Storage Water Heater .64+ UEF (540710)	$175	$87.50	$262.50
Storage Water Heater .68+ UEF (540712)	$175	$87.50	$262.50
Tankless Water Heater .81- .86 UEF	$400	$200	$600
Tankless Water Heater .87 - .92 (- .94 September Only) UEF (540714)	$600	$300	$900
Tankless Water Heater .93-.94 UEF (Effective 10/01/2020)	$800	$400	$1,200
Tankless Water Heater .95+ UEF (541177)	$1,000	$500	$1,500
Thermostatic Valve (540362)	$7.50	$3.75	$11.25
Thermostatic Valve and 1.6 GPM (541106)	$15	$7.50	$22.50
Tubspout & Thermostatic Shut-off Showerhead (541107)	$30	$15	$45

POINT OF SALE (POS)

SCG currently has a contract with various retailers to provide rebates to our customers at the point-of-sale. **(As of 01/01/2021 no retailers are providing POS).**

Depending on the retailer and by the information on the receipt, we can determine if the rebate was in fact provided for the customer at the point of sale.
The currently contracted retailers are Lowes, Leslie's Swimming Pool Supplies and William's Furnace Company.

HOME DEPOT

Home Depot joined the POS retailer group as of 8/11/2020, offering rebates on several Rheem tankless and storage water heaters. **(As of 09/18/2020, POS is no longer available for Home Depot)**

Processors will locate the item's purchase price on the customer's receipt to determine whether the customer received a POS rebate. Since we no longer have any POS retailers this section will serve as informational.

See the following table for eligible Rheem Models:

TANKLESS WATER HEATERS ($600 REBATE):

Item Number	Model Number	Full Price	Discounted Price	Product Description
1003152997	ECOH200DLVN-2	$1299.00	$699.00	Performance Platinum 9.5 GPM Natural Gas High Efficiency Indoor Tankless Water Heater
1003152999	ECOH200XLN-1	$1298.00	$698.00	Performance Platinum 9.5 GPM Natural Gas High Efficiency Outdoor Tankless Water Heater

STORAGE WATER HEATERS ($175 REBATE):

Item Number	Model Number	Full Price	Discounted Price	Product Description
1002960019	XG40T12DU38U*	$755.00	$580.00	Performance Platinum 40 Gal. Tall 12-Year 38,000 BTU Ultra Low NOx

				(ULN) Natural Gas Power Damper Tank Water Heater
1002960021	XG50T12DU38U*	$784.00	$609.00	Performance Platinum 50 Gal. Tall 12-Year 38,000 BTU Ultra Low NOx (ULN) Natural Gas Power Damper Tank Water Heater
1000034937	XG40T12DM40U0	$659.00	$484.00	Performance Platinum 38 Gal. Tall 12 Year 40,000 BTU Natural Gas ENERGY STAR Tank Water Heater
1000034939	XG50T12DM40U0	$744.00	$569.00	Performance Platinum 50 Gal. Tall 12 Year 40,000 BTU Natural Gas ENERGY STAR Tank Water Heater

LESLIE'S SWIMMING POOL SUPPLIES

Leslie's Pool joined the POS retailer group as of 3/31/2019. The POS rebate is currently not displayed on the receipt, however, all pool heaters which meet the EE requirements are provided the rebate at the POS. Any Leslie's Pool purchase MUST be DNQ as Leslie's Pools participate in our POS program if purchased prior to 12/31/2020. **(As of 12/31/2020, POS is no longer available for Leslie's)**

LOWES POS

Lowes joined the POS retailer group as of 3/5/2020, offering POS Rebates for AO Smith Natural Gas Storage Water Heaters and Tankless Water Heaters. **(As of 8/26/2020, POS is no longer available for Lowes)**

Processors will locate the item's purchase price on the customer's receipt to determine whether the customer received a POS Rebate.

Note: As of 7/1/2020, Tankless water heaters with a UEF of .95 or greater qualify for a rebate of $1000 . However, customers only receive a rebate of $600 under Lowe's POS for several of these units. In these instances, the customer is eligible for a rebate of the $400 difference. Please see the table below for reference:

LOWES .95 UEF CHEATSHEET

Item Number	Model number	Begin Date	End Date	POS Rebate	Application Rebate	MISC Fee
2693904	GT15-340-NI	7/1/2020	7/22/2020	$600.00	$1,000.00	-$600.00
2693904	GT15-340-NI	7/23/2020	8/26/2020	$1,000.00	DNQ	NA
2693905	GT15-540-NO	7/1/2020	7/22/2020	$600.00	$1,000.00	-$600.00
2693905	GT15-540-NO	7/23/2020	8/26/2020	$1,000.00	DNQ	NA
1055552	GT15-240-NO	7/1/2020	8/26/2020	$600.00	$1,000.00	-$600.00

See the following table for AO Smith Models eligible for Lowes POS:

STORAGE WATER HEATERS ($175 REBATE):

Item Number	Model Number	Full Price	Discounted Price	Product Description
816111	G12-UFDT5040NV	$774.00	$599.00	AO SMITH 50-GAL 12YR NG ES TL ULN

839895	G12-UFDT4040NV	$935.95	$760.95	A.O. Smith Signature Premier 40-Gallon Tall 12-Year Limited Natural Gas Water Heater
839898	G6-UPVT4042NV	$1184.37	$1009.37	A.O. Smith Signature Premier 40-Gallon Tall 6-Year Limited Natural Gas Water Heater
839899	G6-UPVT5042NV	$1270.64	$1095.64	A.O. Smith Signature Premier 50-Gallon Tall 6-Year Limited Natural Gas Water Heater

TANKLESS WATER HEATERS ($1000 REBATE):

Item Number	Model Number	Full Price	Discounted Price	Product Description
1055552	GT15-240-NO	$949.00		150 - 160K Outdoor Natural Gas (735125)
2693904	GT15-340-NI	$1249.00	$249.00	175 - 180K Indoor Natural Gas
2693905	GT15-540-NO	$1449.00	$449.00	199K Outdoor Natural Gas

TANKLESS WATER HEATERS ($600 REBATE):

Item Number	Model Number	Full Price	Discounted Price	Product Description
1055555	GT15-240-NI	$1499.00	$899.00	150 - 160K Indoor Natural Gas (735124)
1055585	GT15-540-NI	$2140.00	$1540.00	199K Indoor Natural Gas
1055569	GT15-540P-NI	$NA		199K Indoor Natural Gas w/Recirculation Pump

TANKLESS WATER HEATERS ($400 REBATE):

Item Number	Model Number	Full Price	Discounted Price	Product Description
1055556	GT15-310C-I	$1149.00	$749.00	180-190K Indoor CV ULN NG/LP
1055574	GT15-510C-I	$1515.0	$1115.0	199K Indoor CV ULN NG/LP
1055570	GT15-110U-O	$1140.00	$740.00	120 - 140K Outdoor ULN NG/LP
1061596	GT15-310U-O	$749.00	$349.00	180 - 190K Outdoor ULN NG/LP
1055577	GT15-510U-O	$1515.00	$1115.00	199K Outdoor ULN NG/LP

WILLIAMS FURNACE COMPANY

Williams Furnace joined the POS retailer group as of Dec 2018. The POS rebate is currently not displayed on receipt; however, all Williams Furnace Company Natural Gas Gravity Wall Furnace purchases which meet the efficiency of AFUE of 70% or greater are provided the rebate via POS. **(As of 03/31/2021, POS is no longer available for William's Furnace Company)**

Additionally, **ALL** qualifying gravity wall furnaces manufactured by William's Furnaces are rebated as part of SCG's Residential HVAC Upstream program and do not qualify for mail in rebates, regardless of vendor.

SUPPORT TICKETS

Processors are to use the following tickets below when requesting updates to an enrollment such as reopening, re-issuing a new check, requesting a reinspection, etc.

Manual Inspection Request

Use this ticket when the following occurs:

1. Customers are applying for more than one of the same measures in the same service address.

Subject: Request for Manual Inspection Request

Manual Inspection Request	
Requestor:	
Enrollment #:	
Program Name:	
Customers Name:	
Customers Address:	
Measures for Inspection:	
Reason for Inspection:	
Expedite Yes or No:	
Enrollment# of Previous Installation:	
Model/Serial of Previously Paid Measure	

Reopen Workflow Request

This template is used when a workflow needs to be re-opened. Copy the template and edit the information in RED.

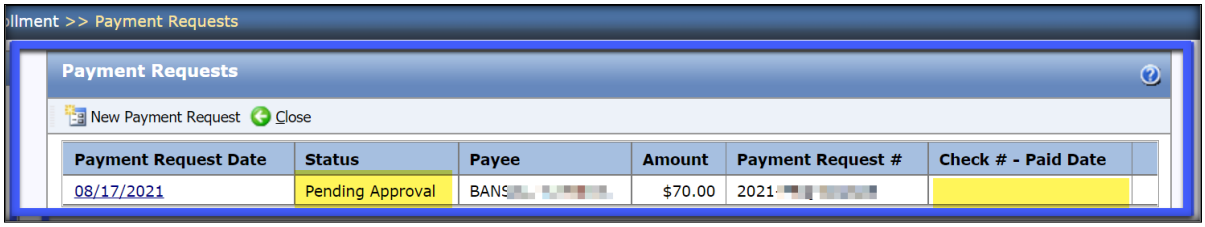
Email will be sent to EECP Help, Approving Supervisors, SCG Inbox, and if application **IS CLOSED** the Approving Program Advisors.

Subject: Request to Re-Open SoCal Gas REEP E#

RE-OPEN WORKFLOW SUPPORT TICKET	
Today's Date	2/20/2021
Requestor's Name	April Fernandez
Enrollment Number	11110602
Program	RES - Residential Program
Enrollment Status	Cancelled
Workflow To Be Re-Opened	Application WF
Reason for re-opening workflow - **Please provide specific details, screenshots, and supporting emails**	Processor DQ'd entire enrollment when it was only the thermostat that was supposed to be DQ'd. CX applied for thermostat and CW. Thermostat failed inspection but CW qualifies. *In body of email please advise "Approval is Needed"
Approving Supervisor	Latisha Wilkins/Brooke Butler/Florencia Alfaro
Approving Program Advisor (If enrollment status is closed)	Ashley Torres/Debbie Eggers

Cancellation of Payment Request

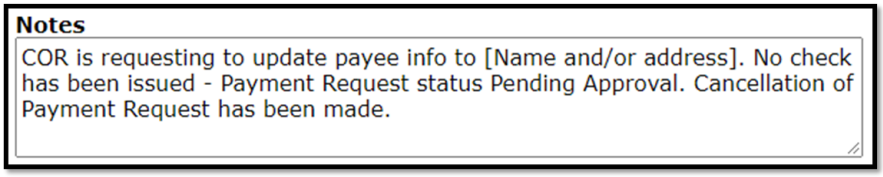
Before sending ticket below, please ensure there is NO check # issued. To determine this, the processor **MUST** go to the **PAYMENT REQUEST** tab via the Enrollment Profile.



Use this template ONLY if Customer is requesting a *change in name or address* to check and a payment request is already underway.

Scenario 1: If Payment Request is in IP Specialist's Queue and IP Workflow has **NOT** been processed:

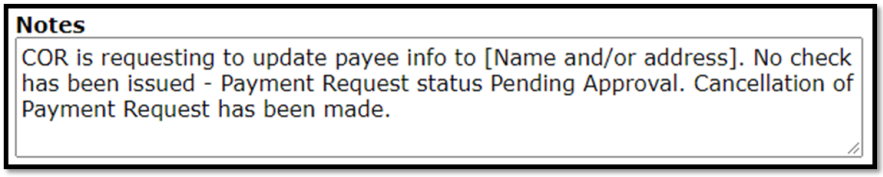
1. Processor will send email to IP Specialist, Processing and QA Team Leads requesting a change in payee
 a. Processor will also note the enrollment to indicate a cancellation of payment request has been sent.



2. IP Specialist will Re-open Application Workflow and notify Processor it has been Re-Opened to make changes
3. Processor will make necessary changes, process the Application, and notify the IP Specialist it has been completed
4. IP Specialist will process IP Workflow

Scenario 2: If Payment Request has been processed by IP Specialist and it is in now in Program Advisor's Queue:

1. Processor will send email to IP Specialist, Processing and QA Team Leads requesting a change in payee
 a. Processor will also note the enrollment to indicate a cancellation of payment request has been sent.



2. IP Specialist will email Program Advisors to send back the payment as a "Correction Required"
3. Once Program Advisors have sent the "Correction Required" the IP Specialist will cancel the Payment Request
4. IP Specialist will Re-open Application Workflow and notify Processor it has been Re-Opened to make changes
5. Processor will make necessary changes, process the Application, add the Initiate Payment Workflow, and notify the IP Specialist it has been completed
6. IP Specialist will process IP Workflow

Subject: Urgent Cancel Check Request E#

Cancellation of Payment Request	
Requestor's Name:	
Caller's Name:	
Applicant/Customer Name:	

Correct Payee Name:	
Correct Payee Address:	
Enrollment Number:	
Reason For Check Being Re-Issued:	
Does the Application Workflow Need to be Re-Opened? (Yes or No)	

To change the payee information on a mobile app (for a owner/rental scenario), a paper application and a tax bill (proving home ownership) is required. The paper application has to be signed and the payee information (section 3) needs to be filled out as well.

Identifying if Payment Request requires CANCELLATION

1. Click on Payment Request in the WF
2. If there are 0 - 1 Approvals, proceed to above template. If Approval is 2, proceed to regular check re-issuance procedures.



EECP Issue Ticket Request

When reporting any EECP technical issues please make sure to use template below. The template is extremely useful to the EECP team as it captures all the elements needed to diagnose, resolve, or elevate reported issues. CC Latisha Wilkins, Brooke Butler, Florencia Alfaro, Sara Perez

Subject: EECP Application - Technical Issue

EECP Application - Technical Issue	
Issue Reported By	
Issue Experienced By (Processor Name/Customer Name)	
Customer Account Number (if available)	

Customer Enrollment Number	
Customer Call Back Number (If applicable)	
Customer Email Address (If applicable)	
Would Customer be ok with EECP Team contacting for further testing/questions? (yes/no) If yes, preferred contact method? (Phone/Email)	
Browser user was using (IE, Chrome, etc)	
Step in which issue occurred? (Step 1, 2, 3, 4, 5, 6, 7, 8, 9, or confirmation email?)	
Is this a – • **Internet Timeout?** • **EECP Error?** • **System Issue?** • **Confirmation Email Issue? Not received? Not displaying properly? Please attach file to ticket.** **Provide steps that led to the issue user is experiencing. Please attach screenshots (if possible).**	

MANUALLY GENERATED EMAILS AND LETTERS

This is intended to provide detailed description of current Incomplete and DNQ emails and letters.

Effective 3/17/2021, applications missing documentation will no longer be placed On-Hold. All applications will be cancelled, sent appropriate correspondence, and asked to reapply.

*Please note only applications with missing signature will be placed On-Hold to provide customers opportunity to submit their signature electronically.

Disqualified/Not Eligible
Disqualified/Outside Service Territory
Duplicate Enrollment
Master Meter
Previous Participation
Received after Program Year End Date
Incomplete - Missing Date of Purchase
Incomplete - Missing Documentation
Incomplete - Missing Permit
Incomplete - Missing Method of Payment
Incomplete - Missing Model Number
Inspection - Customer Non-Responsive
Inspection - Customer Refused
Inspection - Disqualified/Not Eligible
Inspection - Geolocation Fail
Inspection - Incomplete/Missing Documentation
Missing Date of Purchase
Missing Documentation
Missing Method of Payment
Missing Model Number
Incomplete Application
Created in Error
Customer Cancelled Enrollment
2018 I/O
Smart Tstat - Not Connected and/or not a Gas Furna

Incomplete Emails and Letters

Effective 3/17/2021 enrollments will be cancelled at the enrollment level when customer's application is missing information (Date of Purchase, Model Number, Method of Payment, Permit Number, Serial Number, etc.,). Processor will send customers new updated 2021 email/letters correspondence notifying customers they MUST re-apply and include identified missing information.

2021 Incomplete Application (Email or Letter)

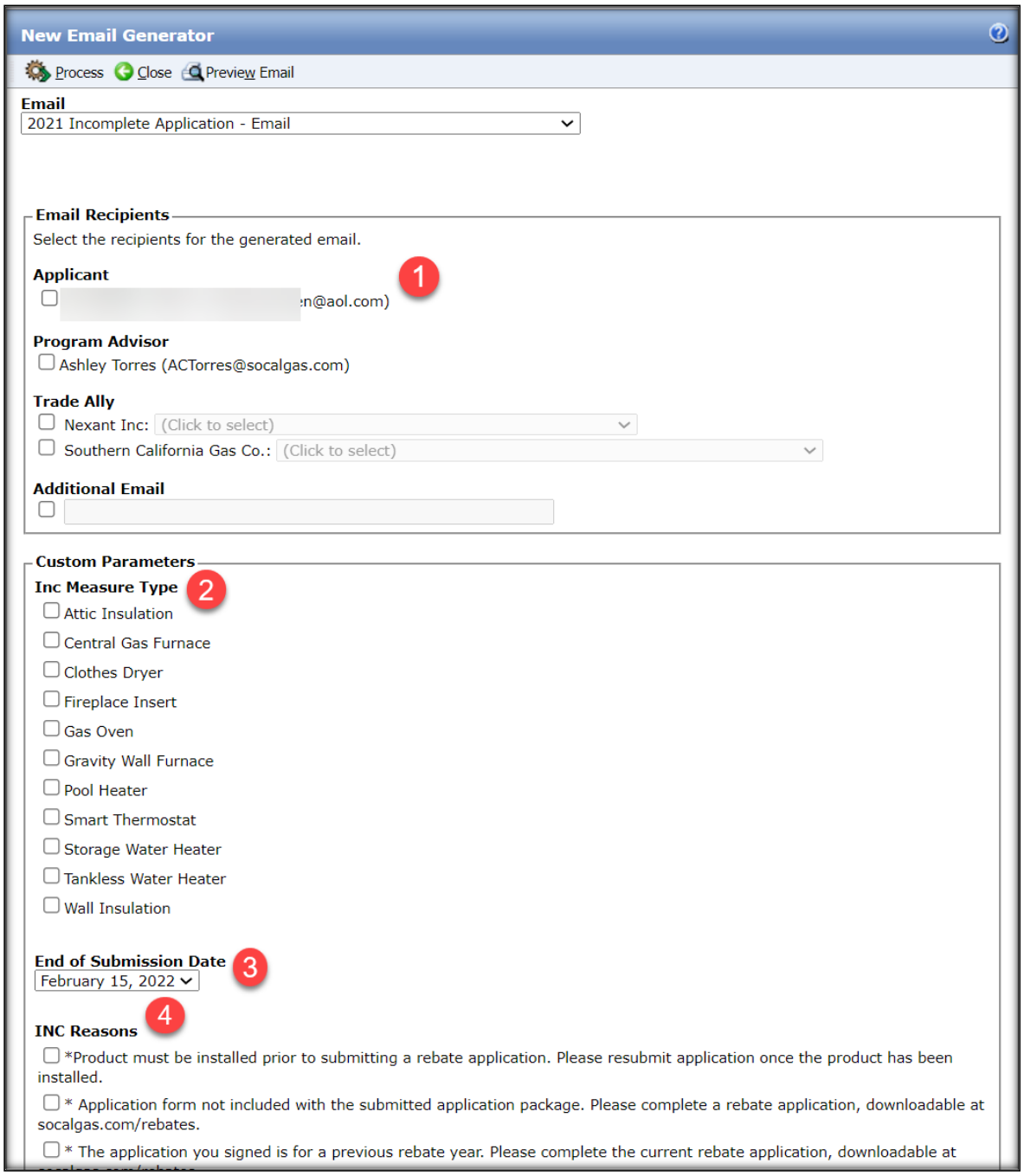
Select "2021 Incomplete Application" Email/Letter when customer's submitted application is missing Date of Purchase, Model Number and/or Method of Payment, Permit Number, and/or Serial Number.

Path: Enrollment → Letter and Emails → New Email or New Letter

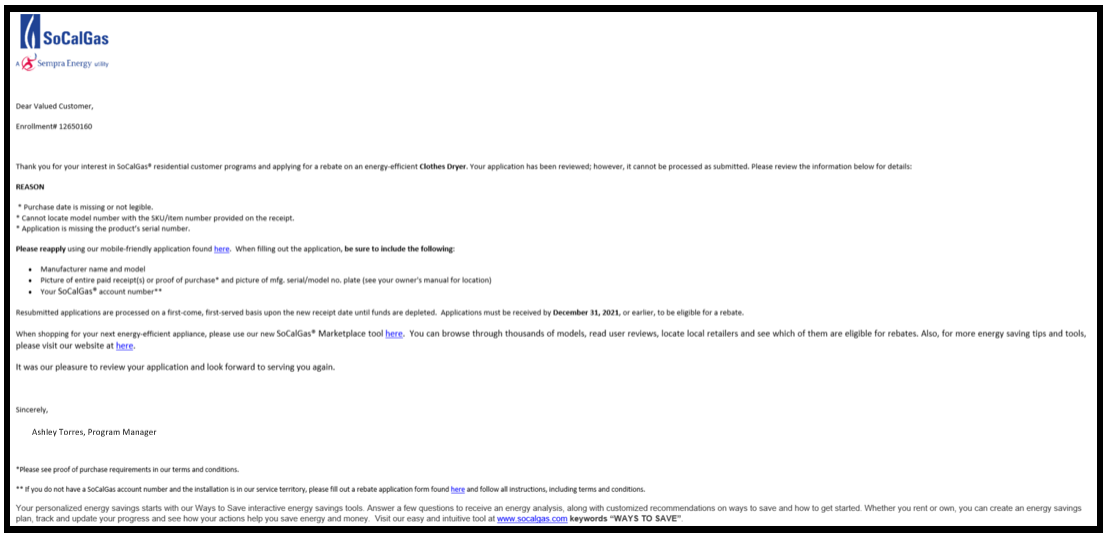
1. Select the "Applicant" under the Email Recipients section.

- **NEVER** send to the Program Advisor and ensure applicant has an email address.
- If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.

2. Select the measure under Inc Measure Type
3. Select the correct **End of Submission Date**.
 - For example, if we are in the 2022 Rebate year, the "End of Submission Date" will be February 15, 2023.
4. Select the reason(s) that correlate to what the customer is missing.
 - You can select more than one reason if customer is missing multiple items.



Email



SoCalGas
A Sempra Energy utility

Dear Valued Customer,

Enrollment# 12650160

Thank you for your interest in SoCalGas® residential customer programs and applying for a rebate on an energy-efficient **Clothes Dryer**. Your application has been reviewed; however, it cannot be processed as submitted. Please review the information below for details:

REASON

* Purchase date is missing or not legible.
* Cannot locate model number with the SKU/item number provided on the receipt.
* Application is missing the product's serial number.

Please reapply using our mobile-friendly application found here. When filling out the application, **be sure to include the following**:

- Manufacturer name and model
- Picture of entire paid receipt(s) or proof of purchase* and picture of mfg. serial/model no. plate (see your owner's manual for location)
- Your SoCalGas® account number**

Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date until funds are depleted. Applications must be received by **December 31, 2021**, or earlier, to be eligible for a rebate.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again.

Sincerely,

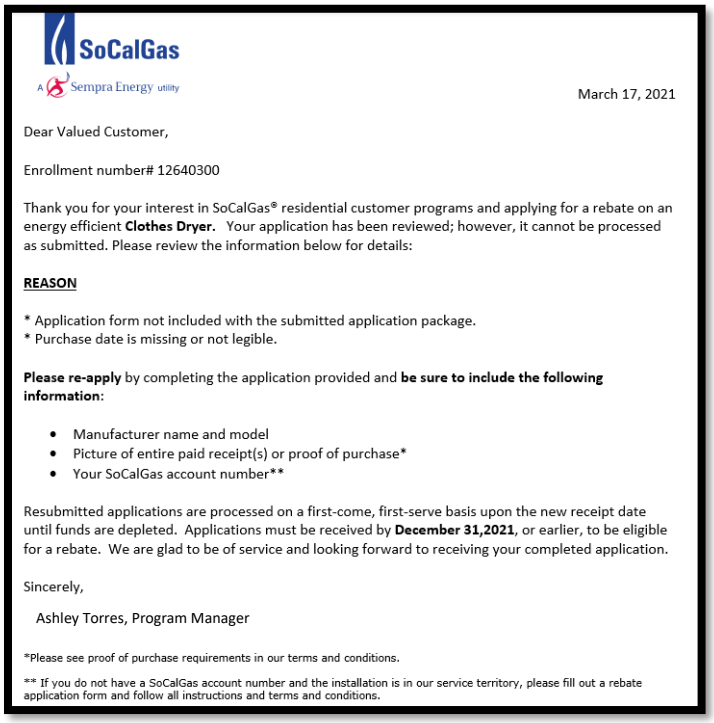
Ashley Torres, Program Manager

*Please see proof of purchase requirements in our terms and conditions.

** If you do not have a SoCalGas account number and the installation is in our service territory, please fill out a rebate application form found here and follow all instructions, including terms and conditions.

Your personalized energy savings starts with our Ways to Save interactive energy savings tools. Answer a few questions to receive an energy analysis, along with customized recommendations on ways to save and how to get started. Whether you rent or own, you can create an energy savings plan, track and update your progress and see how your actions help you save energy and money. Visit our easy and intuitive tool at www.socalgas.com **keywords "WAYS TO SAVE"**.

Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® residential customer programs and applying for a rebate on an energy efficient **Clothes Dryer.** Your application has been reviewed; however, it cannot be processed as submitted. Please review the information below for details:

REASON

* Application form not included with the submitted application package.
* Purchase date is missing or not legible.

Please re-apply by completing the application provided and **be sure to include the following information**:

- Manufacturer name and model
- Picture of entire paid receipt(s) or proof of purchase*
- Your SoCalGas account number**

Resubmitted applications are processed on a first-come, first-serve basis upon the new receipt date until funds are depleted. Applications must be received by **December 31,2021**, or earlier, to be eligible for a rebate. We are glad to be of service and looking forward to receiving your completed application.

Sincerely,

Ashley Torres, Program Manager

*Please see proof of purchase requirements in our terms and conditions.

** If you do not have a SoCalGas account number and the installation is in our service territory, please fill out a rebate application form and follow all instructions and terms and conditions.

2021 Incomplete Missing Signature – (Email or Letter)

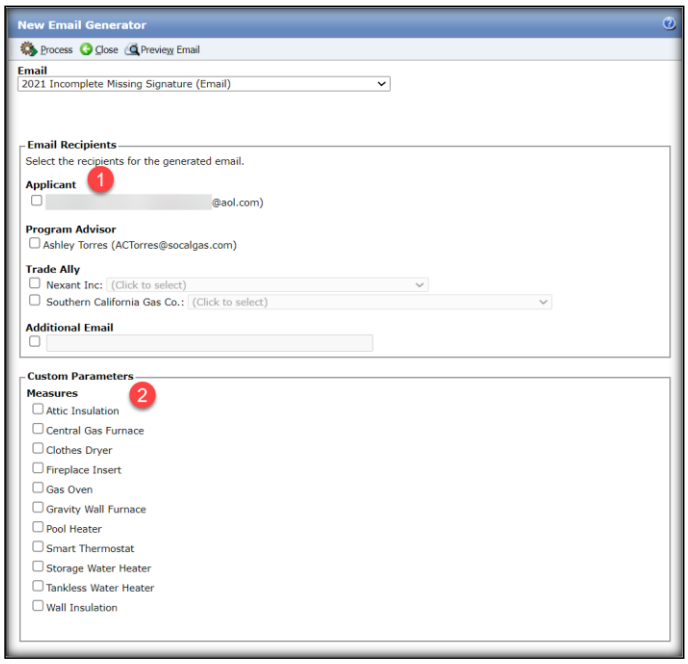
Select "2021 Incomplete Missing Signature" Email/Letter when customer's submitted application is only Missing the Signature on the Application.

Path: Enrollment → Letter and Emails → New Email or New Letter

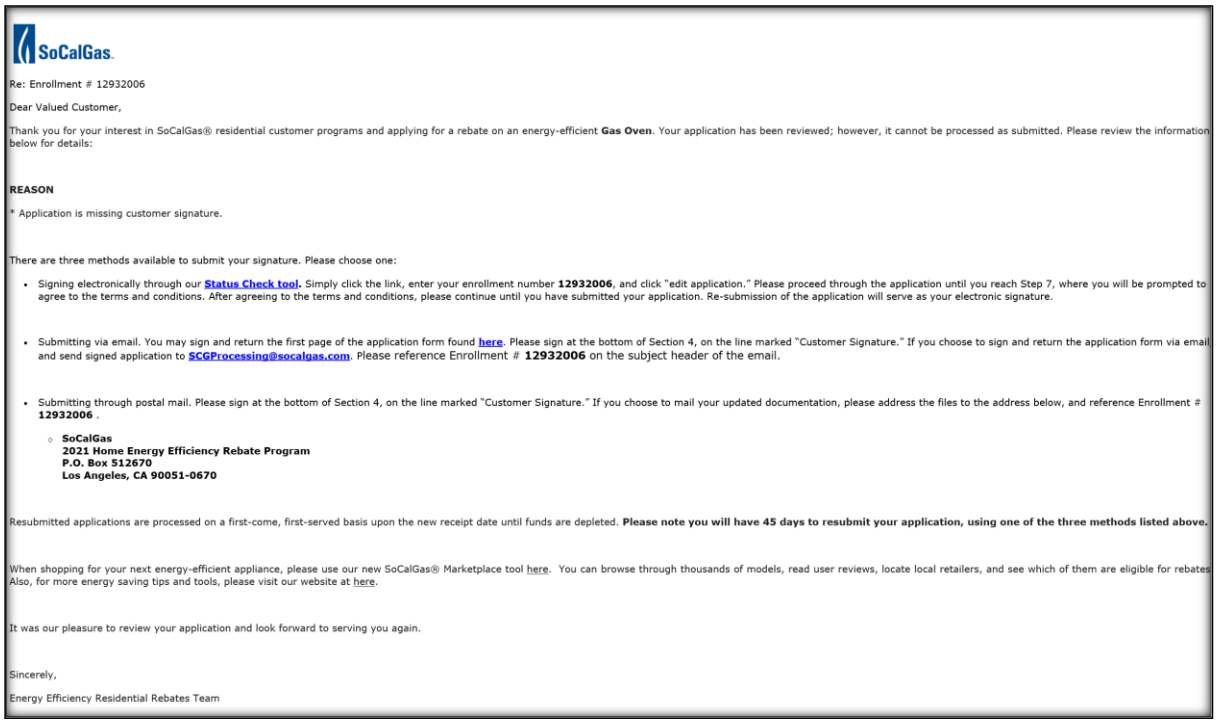
1. Select the "Applicant" under the Email Recipients section.

- **NEVER** send to the Program Advisor and ensure applicant has an email address.
- If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.

2. Select the measure under Inc Measure Type



Email



SoCalGas

Re: Enrollment # 12932006

Dear Valued Customer,

Thank you for your interest in SoCalGas® residential customer programs and applying for a rebate on an energy-efficient **Gas Oven**. Your application has been reviewed; however, it cannot be processed as submitted. Please review the information below for details:

REASON

* Application is missing customer signature.

There are three methods available to submit your signature. Please choose one:

- Signing electronically through our **Status Check tool.** Simply click the link, enter your enrollment number **12932006**, and click "edit application." Please proceed through the application until you reach Step 7, where you will be prompted to agree to the terms and conditions. After agreeing to the terms and conditions, please continue until you have submitted your application. Re-submission of the application will serve as your electronic signature.
- Submitting via email. You may sign and return the first page of the application form found **here**. Please sign at the bottom of Section 4, on the line marked "Customer Signature." If you choose to sign and return the application form via email and send signed application to **SCGProcessing@socalgas.com**. Please reference Enrollment # **12932006** on the subject header of the email.
- Submitting through postal mail. Please sign at the bottom of Section 4, on the line marked "Customer Signature." If you choose to mail your updated documentation, please address the files to the address below, and reference Enrollment # **12932006** .
 - **SoCalGas**
 2021 Home Energy Efficiency Rebate Program
 P.O. Box 512670
 Los Angeles, CA 90051-0670

Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date until funds are depleted. **Please note you will have 45 days to resubmit your application, using one of the three methods listed above.**

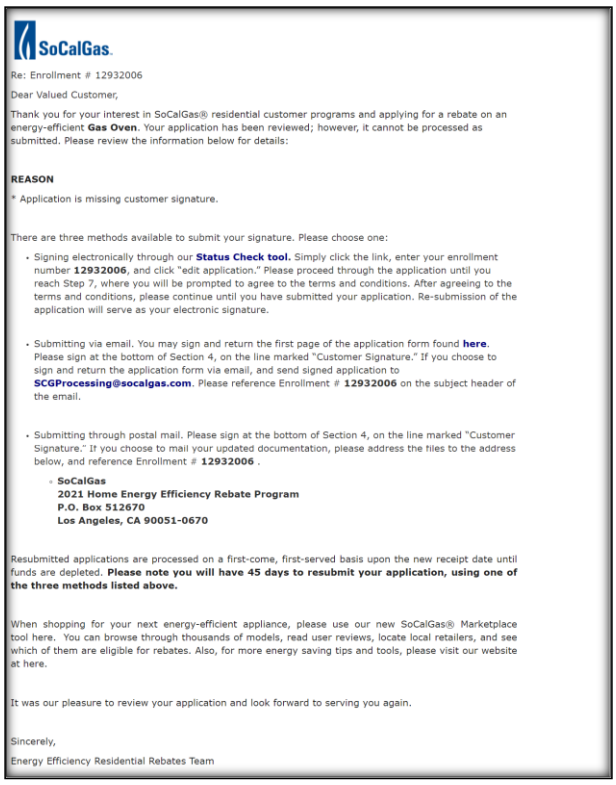
When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again.

Sincerely,

Energy Efficiency Residential Rebates Team

Letter



SoCalGas

Re: Enrollment # 12932006

Dear Valued Customer,

Thank you for your interest in SoCalGas® residential customer programs and applying for a rebate on an energy-efficient **Gas Oven**. Your application has been reviewed; however, it cannot be processed as submitted. Please review the information below for details:

REASON

* Application is missing customer signature.

There are three methods available to submit your signature. Please choose one:

- Signing electronically through our **Status Check tool.** Simply click the link, enter your enrollment number **12932006**, and click "edit application." Please proceed through the application until you reach Step 7, where you will be prompted to agree to the terms and conditions. After agreeing to the terms and conditions, please continue until you have submitted your application. Re-submission of the application will serve as your electronic signature.

- Submitting via email. You may sign and return the first page of the application form found **here**. Please sign at the bottom of Section 4, on the line marked "Customer Signature." If you choose to sign and return the application form via email, and send signed application to **SCGProcessing@socalgas.com**. Please reference Enrollment # **12932006** on the subject header of the email.

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 2021 Home Energy Efficiency Rebate Program
 P.O. Box 512670
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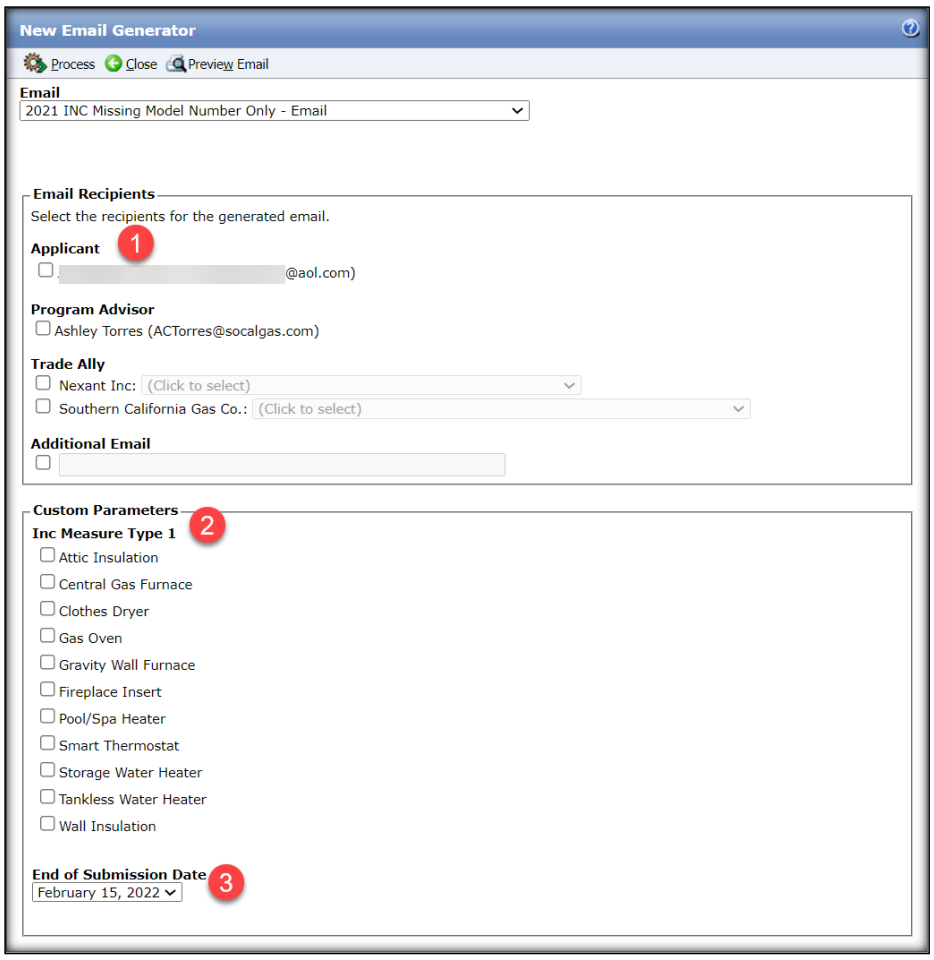
Energy Efficiency Residential Rebates Team

2021 INC MISSING MODEL NUMBER ONLY – (EMAIL OR LETTER)

Select "2021 INC Missing Model Number Only" Email/Letter when customer's submitted application is only Missing the Model Number.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type
3. Select the correct **End of Submission Date**.
 - For example, if we are in the 2022 Rebate year, the "End of Submission Date" will be February 15, 2023.



Email



SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 4 of the rebate application. The T&C explains to be eligible, proof of purchase must include*:

- Itemized description of each product, including such information as:
 - Manufacturer, product make and model number(s) and other identifying information.

Additionally, altered or illegible receipts will not be accepted.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because the receipt/invoice is missing the model number to the specific product. Please reapply here and ensure a picture of the **Clothes Dryer's** manufacturer plate is included with the application. Generally, manufacturer plates are located inside the door, on the side, or in the rear. Please refer to your **Clothes Dryer's** owner manual to find the manufacturer plate for your specific product.

Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date until funds are depleted. Application must be received by **December 31, 2021,** or earlier, to be eligible for a rebate.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again.

Kind regards,

Ashley Torres, Program Manager

*Complete terms and conditions can be found at www.socalgas.com/rebates

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Connect with us

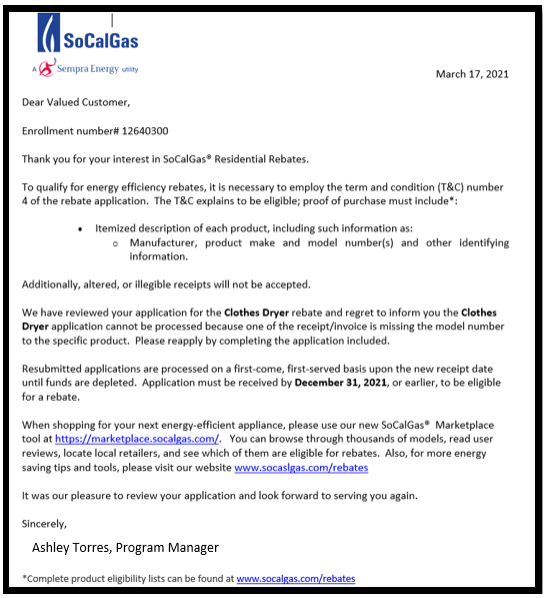
socalgas.com | Bill Assistance| Rebate Programs

Please do not reply to this email. Email sent to this address cannot be answered. For assistance, please visit our Help Center. Southern California Gas Company values your privacy. For more information, view our Privacy Policy and Privacy Notice.

Notification code: 14

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 4 of the rebate application. The T&C explains to be eligible; proof of purchase must include*:

- Itemized description of each product, including such information as:
 - Manufacturer, product make and model number(s) and other identifying information.

Additionally, altered, or illegible receipts will not be accepted.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because one of the receipt/invoice is missing the model number to the specific product. Please reapply by completing the application included.

Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date until funds are depleted. Application must be received by **December 31, 2021**, or earlier, to be eligible for a rebate.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socalgas.com/rebates

It was our pleasure to review your application and look forward to serving you again.

Sincerely,

Ashley Torres, Program Manager

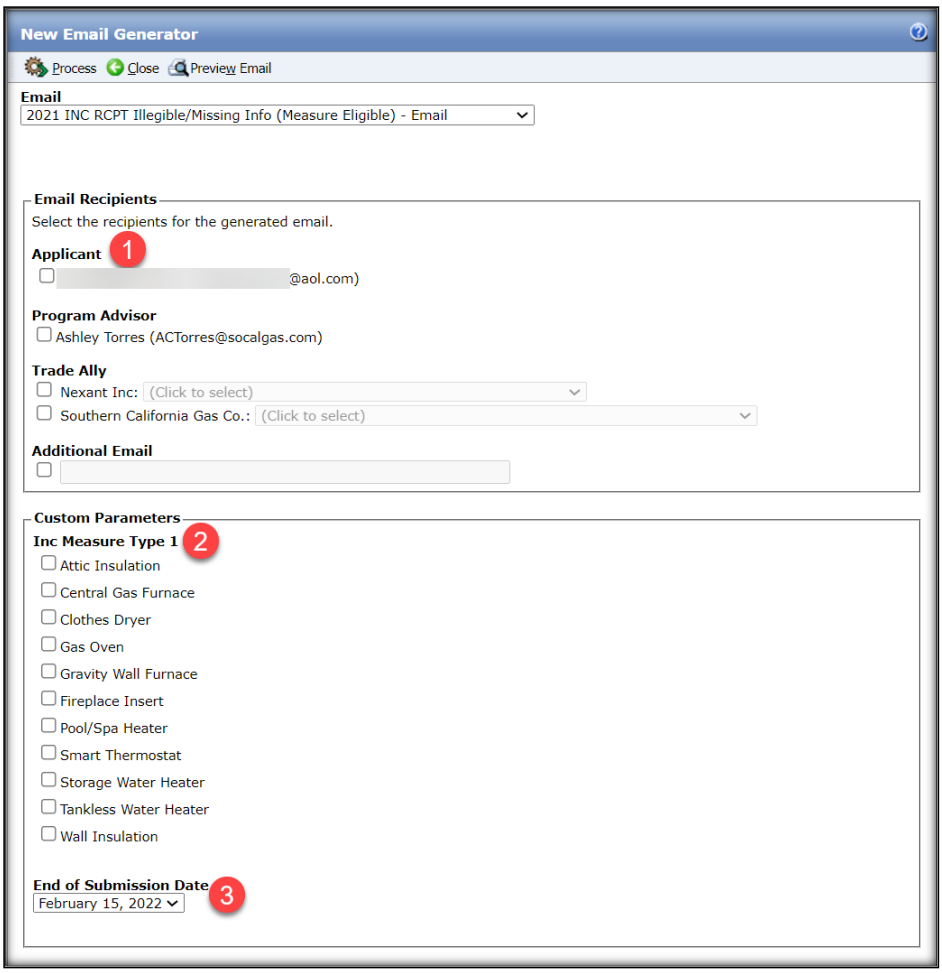
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 INC RECEIPT ILLEGIBLE/MISSING INFO – (EMAIL OR LETTER)

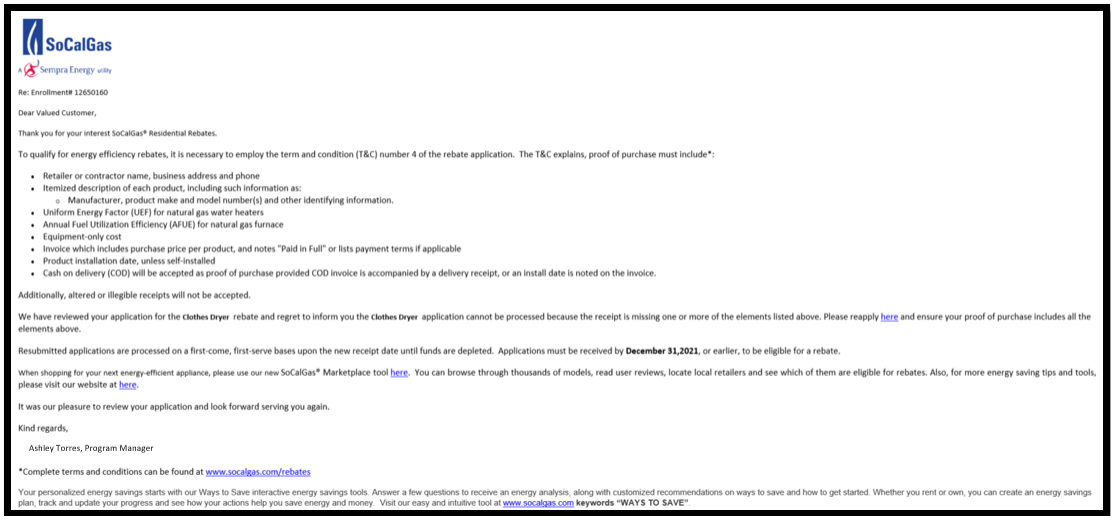
Select "2021 INC Receipt Illegible/Missing Info" Email/Letter when customer's submitted receipt/invoice is illegible and/ or missing information such as Unit efficiency, equipment cost, Installation Date, Retailer, Itemized description, Missing Paid in Full, COD

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type
3. Select the correct **End of Submission Date**.
 - For example, if we are in the 2022 Rebate year, the "End of Submission Date" will be February 15, 2023.



Email



SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 4 of the rebate application. The T&C explains, proof of purchase must include*:

- Retailer or contractor name, business address and phone
- Itemized description of each product, including such information as:
 - Manufacturer, product make and model number(s) and other identifying information.
- Uniform Energy Factor (UEF) for natural gas water heaters
- Annual Fuel Utilization Efficiency (AFUE) for natural gas furnace
- Equipment-only cost
- Invoice which includes purchase price per product, and notes "Paid in Full" or lists payment terms if applicable
- Product installation date, unless self-installed
- Cash on delivery (COD) will be accepted as proof of purchase provided COD invoice is accompanied by a delivery receipt, or an install date is noted on the invoice.

Additionally, altered or illegible receipts will not be accepted.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because the receipt is missing one or more of the elements listed above. Please reapply here and ensure your proof of purchase includes all the elements above.

Resubmitted applications are processed on a first-come, first-serve bases upon the new receipt date until funds are depleted. Applications must be received by **December 31,2021**, or earlier, to be eligible for a rebate.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward serving you again.

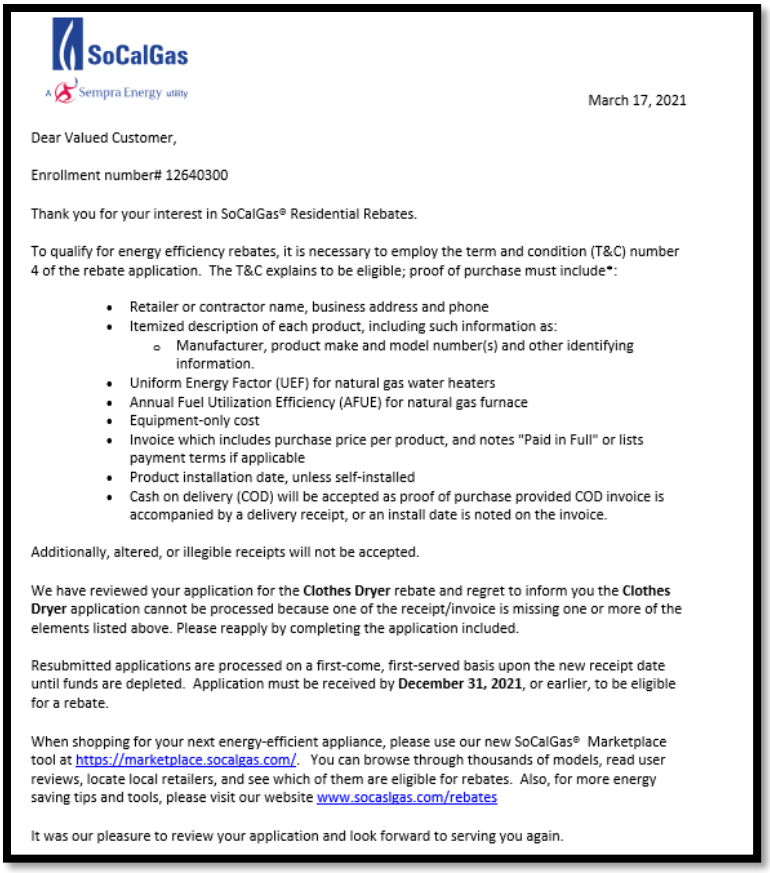
Kind regards,

Ashley Torres, Program Manager

*Complete terms and conditions can be found at www.socalgas.com/rebates

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 4 of the rebate application. The T&C explains to be eligible; proof of purchase must include*:

- Retailer or contractor name, business address and phone
- Itemized description of each product, including such information as:
 - Manufacturer, product make and model number(s) and other identifying information.
- Uniform Energy Factor (UEF) for natural gas water heaters
- Annual Fuel Utilization Efficiency (AFUE) for natural gas furnace
- Equipment-only cost
- Invoice which includes purchase price per product, and notes "Paid in Full" or lists payment terms if applicable
- Product installation date, unless self-installed
- Cash on delivery (COD) will be accepted as proof of purchase provided COD invoice is accompanied by a delivery receipt, or an install date is noted on the invoice.

Additionally, altered, or illegible receipts will not be accepted.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because one of the receipt/invoice is missing one or more of the elements listed above. Please reapply by completing the application included.

Resubmitted applications are processed on a first-come, first-served basis upon the new receipt date until funds are depleted. Application must be received by **December 31, 2021**, or earlier, to be eligible for a rebate.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socalgas.com/rebates

It was our pleasure to review your application and look forward to serving you again.

DISQUALIFICATION EMAILS AND LETTERS

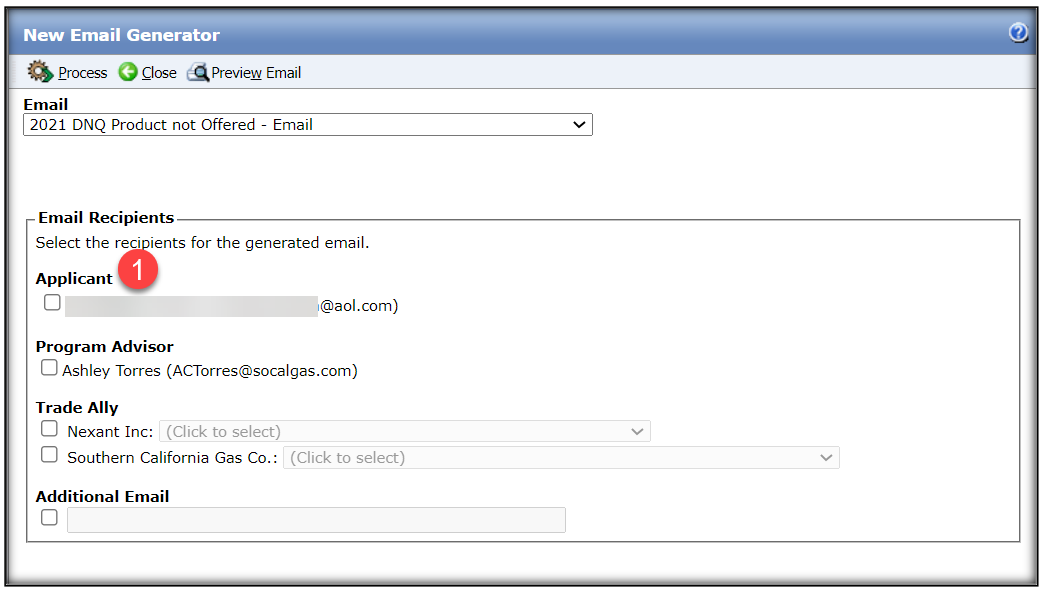
DNQ Emails/Letters are to be sent to customer when the application as submitted does not qualify for the current rebate offerings. Effective 3/18/2021, processors are to use the new 2021 DNQ correspondence when sending correspondence to applicants.

2021 DNQ – PRODUCT NOT OFFERED (EMAIL/LETTER)

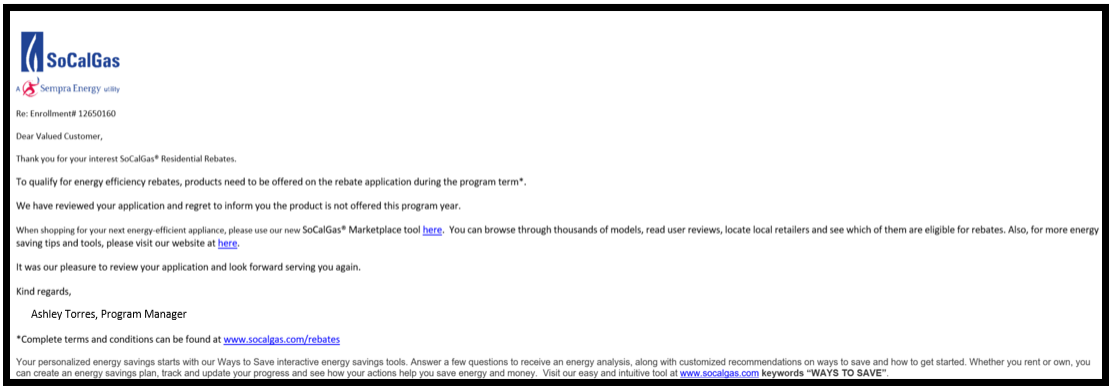
Select "2021 DNQ – Product not offered" Email/Letter when customer submitted application for a product not offered during our current program year.

Processor will select: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.



Email



SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, products need to be offered on the rebate application during the program term*.

We have reviewed your application and regret to inform you the product is not offered this program year.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward serving you again.

Kind regards,

Ashley Torres, Program Manager

*Complete terms and conditions can be found at www.socalgas.com/rebates

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, products need to be offered on the rebate application during the program term*.

We have reviewed your application and regret to inform you the product is not offered this program year.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socasigas.com/rebates

It was our pleasure to review your application and look forward to serving you again.

Sincerely,

Ashley Torres, Program Manager

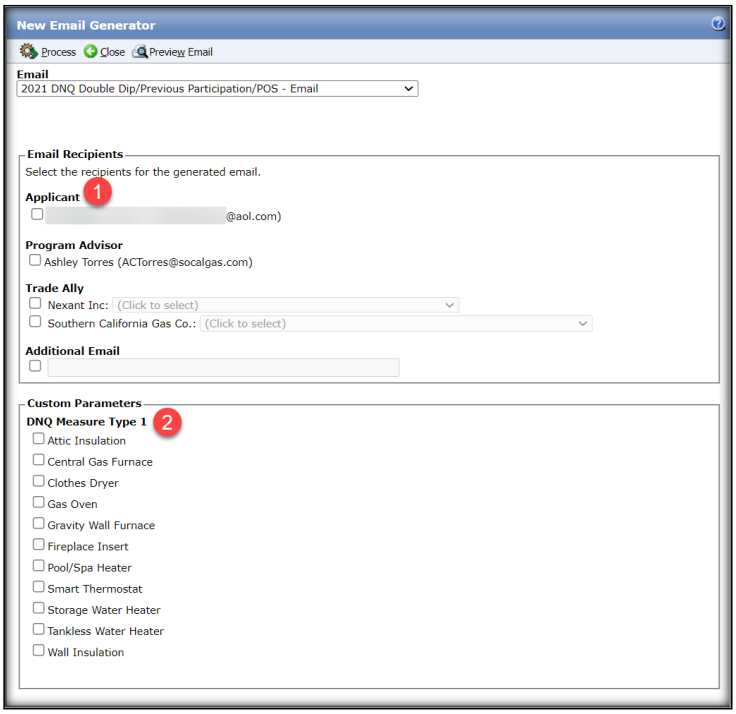
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – Double Dip/Previous Participation/POS (Email/Letter)

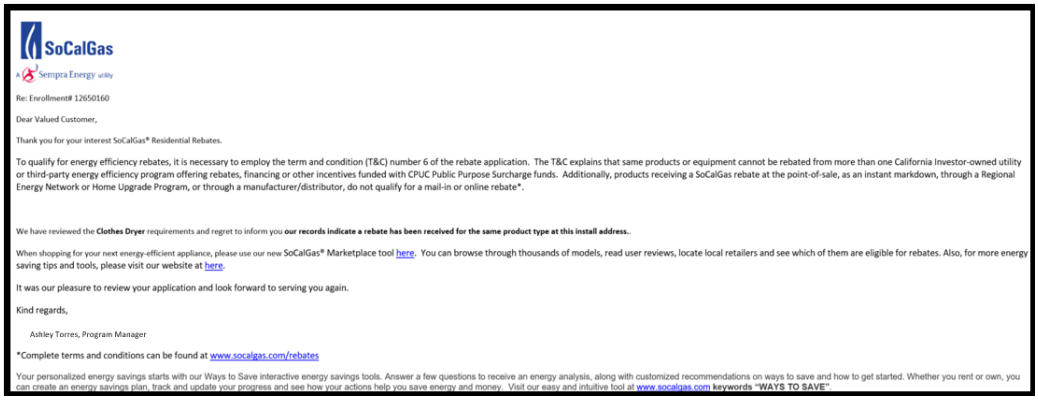
Select "2021 DNQ – Double Dip/Precious Participation/POS" Email/Letter when customer has been identified to have participated and has already received a rebate for the same measure, under the same account, within 5 years. This is not limited to measures received as part of the Residential Energy Efficiency Program but through other rebate programs as well.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email


SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 6 of the rebate application. The T&C explains that same products or equipment cannot be rebated from more than one California Investor-owned utility or third-party energy efficiency program offering rebates, financing or other incentives funded with CPUC Public Purpose Surcharge funds. Additionally, products receiving a SoCalGas rebate at the point-of-sale, as an instant markdown, through a Regional Energy Network or Home Upgrade Program, or through a manufacturer/distributor, do not qualify for a mail-in or online rebate*.

We have reviewed the **Clothes Dryer** requirements and regret to inform you **our records indicate a rebate has been received for the same product type at this install address.**.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

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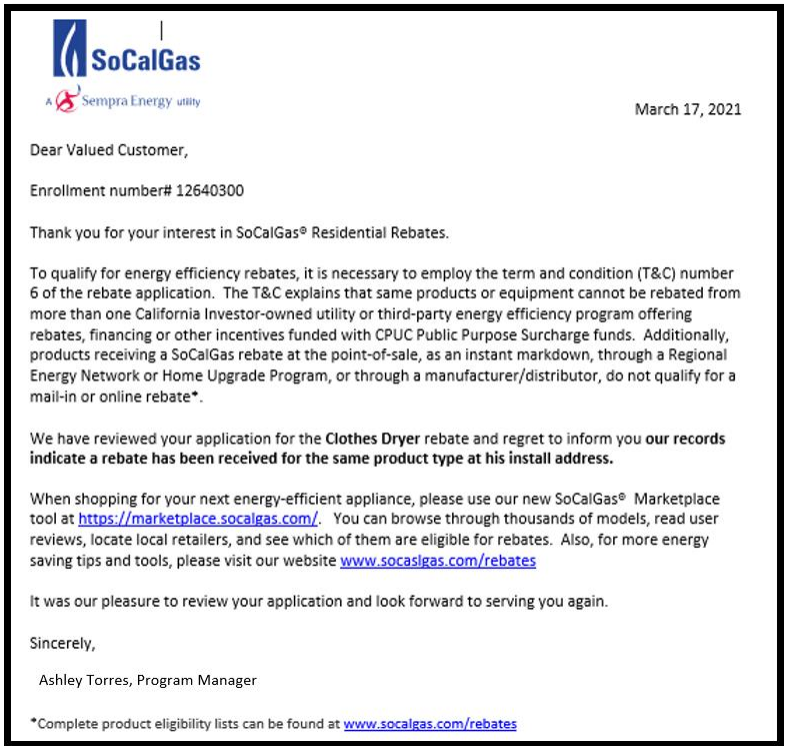
Kind regards,

Ashley Torres, Program Manager

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

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Enrollment number# 12640300

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We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you **our records indicate a rebate has been received for the same product type at his install address.**

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socaslgas.com/rebates

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Sincerely,

Ashley Torres, Program Manager

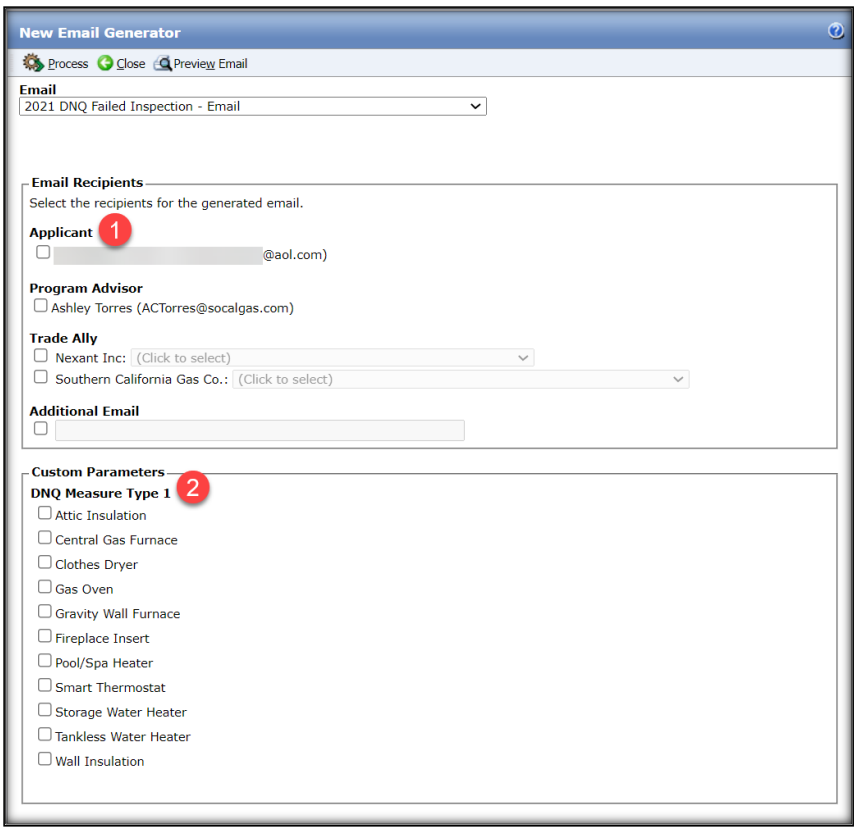
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – Failed Inspection (Email/Letter)

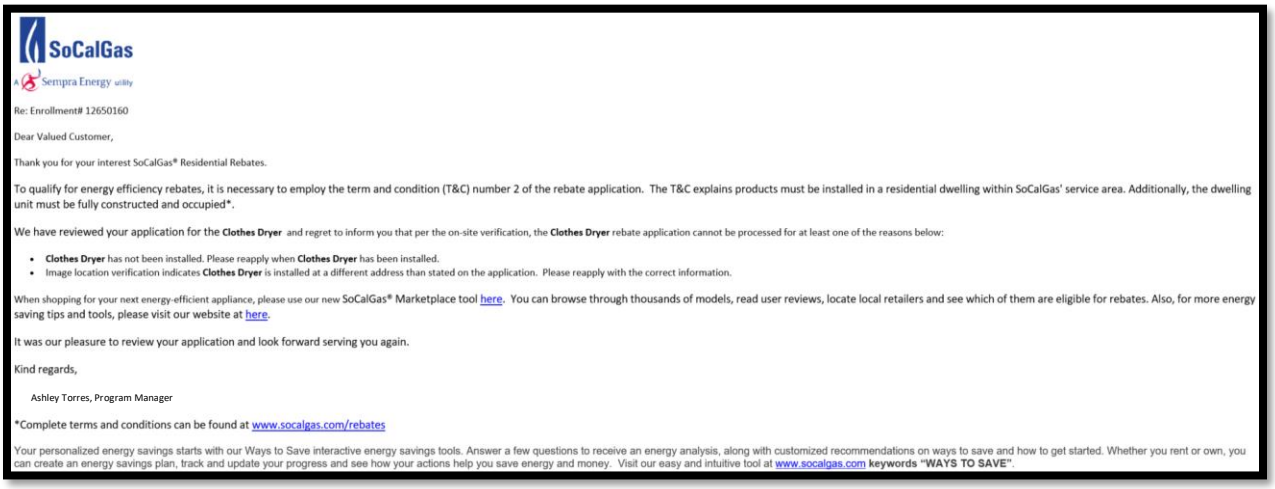
Select "2021 DNQ – Failed Inspection" Email/Letter when customer's inspection has failed due to equipment not installed or image location indicates it is outside the 0.30-mile range.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email


SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 2 of the rebate application. The T&C explains products must be installed in a residential dwelling within SoCalGas' service area. Additionally, the dwelling unit must be fully constructed and occupied*.

We have reviewed your application for the **Clothes Dryer** and regret to inform you that per the on-site verification, the **Clothes Dryer** rebate application cannot be processed for at least one of the reasons below:

- **Clothes Dryer** has not been installed. Please reapply when **Clothes Dryer** has been installed.
- Image location verification indicates **Clothes Dryer** is installed at a different address than stated on the application. Please reapply with the correct information.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward serving you again.

Kind regards,

Ashley Torres, Program Manager

*Complete terms and conditions can be found at www.socalgas.com/rebates

Your personalized energy savings starts with our Ways to Save interactive energy savings tools. Answer a few questions to receive an energy analysis, along with customized recommendations on ways to save and how to get started. Whether you rent or own, you can create an energy savings plan, track and update your progress and see how your actions help you save energy and money. Visit our easy and intuitive tool at www.socalgas.com **keywords "WAYS TO SAVE"**.

Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ term and condition (T & C) number 2 of the rebate application. The T & C explains products must be installed in a residential dwelling within SoCalGas 'service area. Additionally, the dwelling unit must be fully constructed and occupied*.

We have reviewed your application for the **Clothes Dryer** and regret to inform you that per the on-site verification, the **Clothes Dryer** rebate application cannot be processed for at least one of the reasons below:

- **Clothes Dryer** has not been installed. Please reapply when **Clothes Dryer** has been installed.
- Image location verification indicates **Clothes Dryer** is installed at a different address than stated on the application. Please reapply with the correct information.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socalgas.com/rebates

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Sincerely,

Ashley Torres, Program Manager

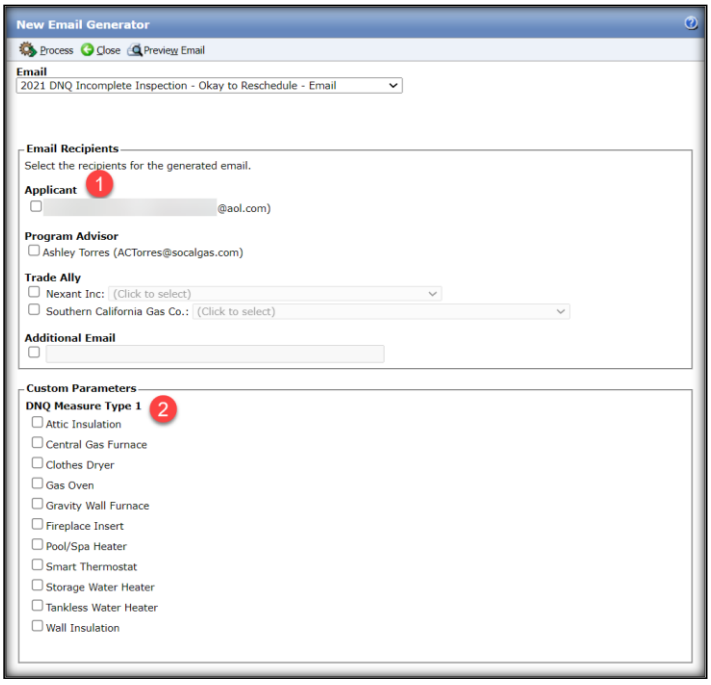
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – Incomplete Inspection – Ok to Reschedule (Email/Letter)

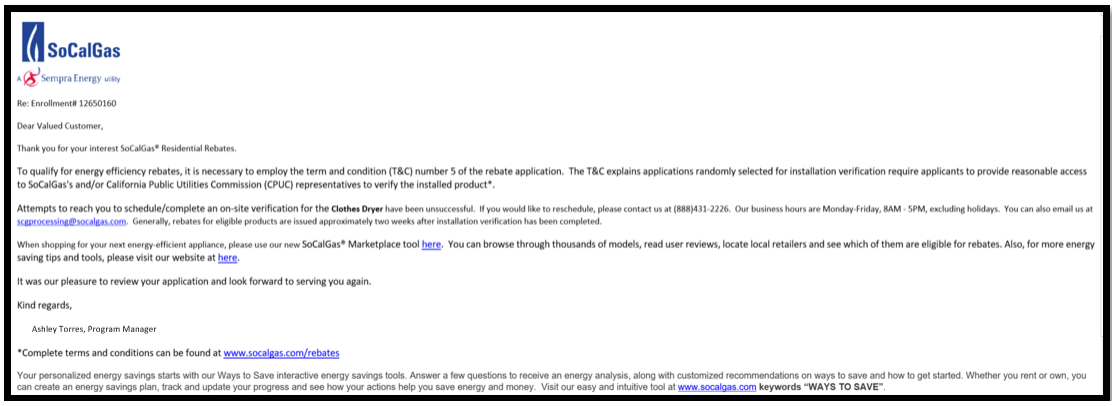
Select "2021 DNQ – Incomplete Inspection – ok to Reschedule" Email/Letter when attempts for inspection have been unsuccessful.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email



SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 5 of the rebate application. The T&C explains applications randomly selected for installation verification require applicants to provide reasonable access to SoCalGas's and/or California Public Utilities Commission (CPUC) representatives to verify the installed product*.

Attempts to reach you to schedule/complete an on-site verification for the **Clothes Dryer** have been unsuccessful. If you would like to reschedule, please contact us at (888)431-2226. Our business hours are Monday-Friday, 8AM - 5PM, excluding holidays. You can also email us at scgprocessing@socalgas.com. Generally, rebates for eligible products are issued approximately two weeks after installation verification has been completed.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again.

Kind regards,

Ashley Torres, Program Manager

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ term and condition (T & C) number 5 of the rebate application. The T & C explains applications randomly selected for installation verification require applicants to provide reasonable access to SoCalGas' and/or California Public Utilities Commission (CPUC) representatives to verify the installed product*.

Attempts to reach you to schedule/complete an on-site verification for the <product> have been unsuccessful. If you would like to reschedule, please contact us at (888) 431-2226. Our business hours are Monday – Friday, 8 AM – 5 PM, excluding holidays. You can also email us at scgprocessing@socalgas.com. Generally, rebates for eligible products are issued approximately two weeks after installation verification has been completed.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socaslgas.com/rebates

It was our pleasure to review your application and look forward to serving you again.

Sincerely,

Ashley Torres, Program Manager

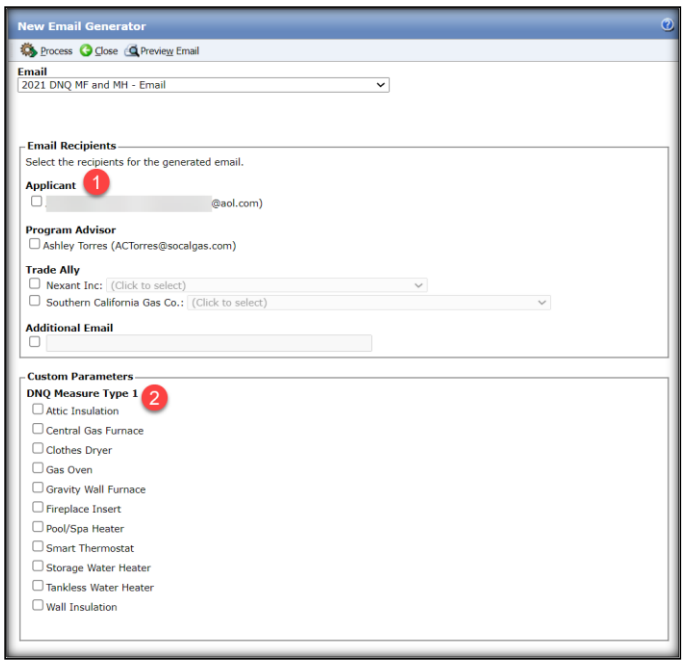
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – MF AND MH (EMAIL/LETTER)

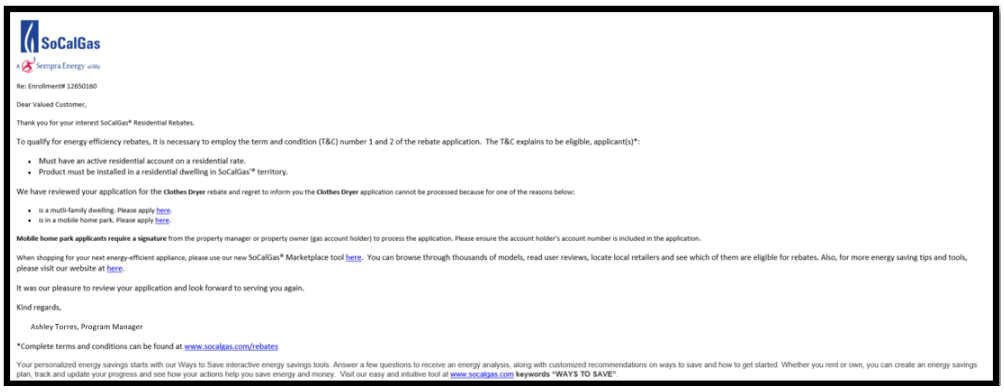
Select "2021 DNQ – MF and MH" Email/Letter applicant address is a multi-family or mobile home.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email



SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 1 and 2 of the rebate application. The T&C explains to be eligible, applicant(s)*:

- Must have an active residential account on a residential rate.
- Product must be installed in a residential dwelling in SoCalGas'® territory.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because for one of the reasons below:

- is a mutli-family dwelling. Please apply here.
- is in a mobile home park. Please apply here.

Mobile home park applicants require a signature from the property manager or property owner (gas account holder) to process the application. Please ensure the account holder's account number is included in the application.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again.

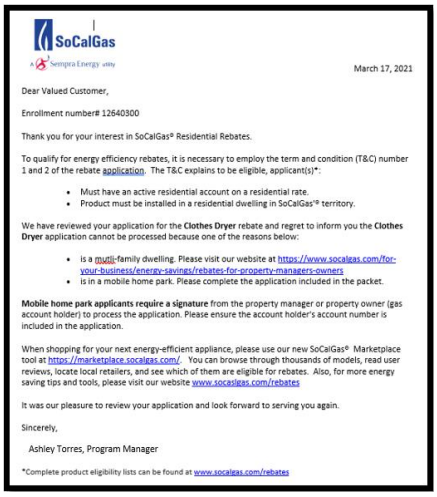
Kind regards,

Ashley Torres, Program Manager

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 1 and 2 of the rebate application. The T&C explains to be eligible, applicant(s)*:

- Must have an active residential account on a residential rate.
- Product must be installed in a residential dwelling in SoCalGas'® territory.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because one of the reasons below:

- is a mutli-family dwelling. Please visit our website at https://www.socalgas.com/for-your-business/energy-savings/rebates-for-property-managers-owners
- is in a mobile home park. Please complete the application included in the packet.

Mobile home park applicants require a signature from the property manager or property owner (gas account holder) to process the application. Please ensure the account holder's account number is included in the application.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socasigas.com/rebates

It was our pleasure to review your application and look forward to serving you again.

Sincerely,

Ashley Torres, Program Manager

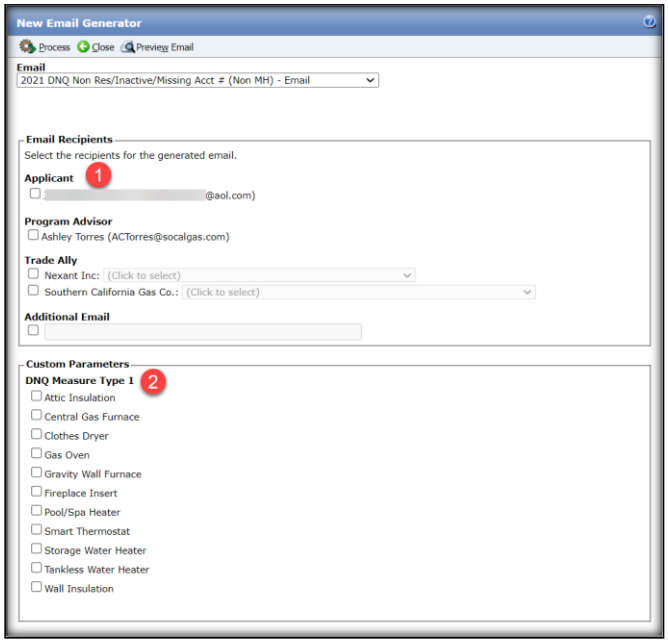
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – Non Res/Inactive/Missing Account # (Non MH) (Email/Letter)

Select "2021 DNQ – Non Res/Inactive/Missing Account # (non MH)" when customer account is inactive, non-residential rate, outside our service territory, not able to locate account number/service address.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email


SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 1 and 2 of the rebate application. The T&C explains to be eligible, applicant(s)*:

- Must have an active residential account on a residential rate.
- Product must be installed in a residential dwelling in SoCalGas'® territory.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed for one of the reasons below. The dwelling:

- does not have an active account
- is not on a residential rate
- is outside our service territory

If you think this is an error, please contact our general service line 24 hrs a day, 7 days a week, at (800) 427-2200 to active, or update your account. Once that is completed, please reapply with your (new) SoCalGas® account number here or Multi-Family accounts can find eligible products here.

For more energy saving tips and tools, please visit our website here.

It was our pleasure to review your application and look forward to serving you again.

Kind regards,

Ashley Torres, Program Manager

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Connect with us

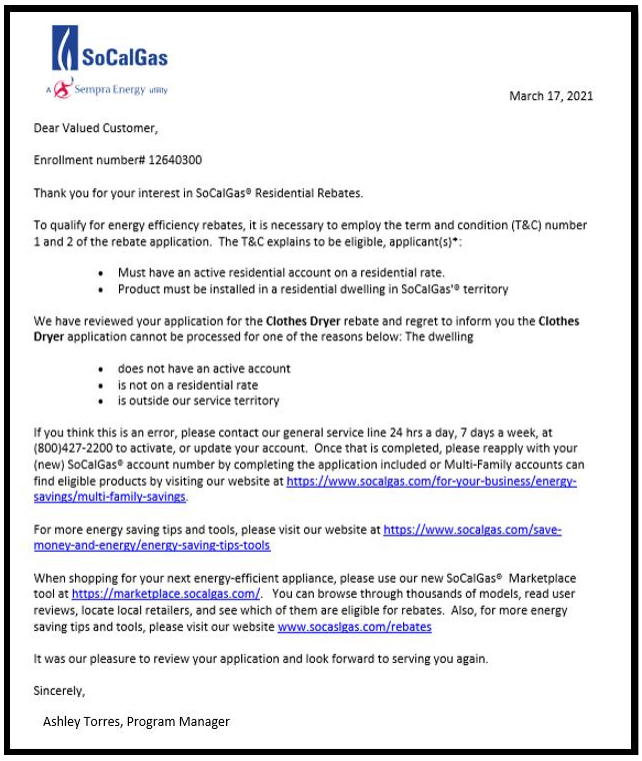
socalgas.com | Bill Assistance| Rebate Programs

Please do not reply to this email. Email sent to this address cannot be answered. For assistance, please visit our Help Center. Southern California Gas Company values your privacy. For more information, view our Privacy Policy and Privacy Notice.

Notification code: 14

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 1 and 2 of the rebate application. The T&C explains to be eligible, applicant(s)*:

- Must have an active residential account on a residential rate.
- Product must be installed in a residential dwelling in SoCalGas'® territory

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed for one of the reasons below: The dwelling

- does not have an active account
- is not on a residential rate
- is outside our service territory

If you think this is an error, please contact our general service line 24 hrs a day, 7 days a week, at (800)427-2200 to activate, or update your account. Once that is completed, please reapply with your (new) SoCalGas® account number by completing the application included or Multi-Family accounts can find eligible products by visiting our website at https://www.socalgas.com/for-your-business/energy-savings/multi-family-savings.

For more energy saving tips and tools, please visit our website at https://www.socalgas.com/save-money-and-energy/energy-saving-tips-tools

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socalgas.com/rebates

It was our pleasure to review your application and look forward to serving you again.

Sincerely,

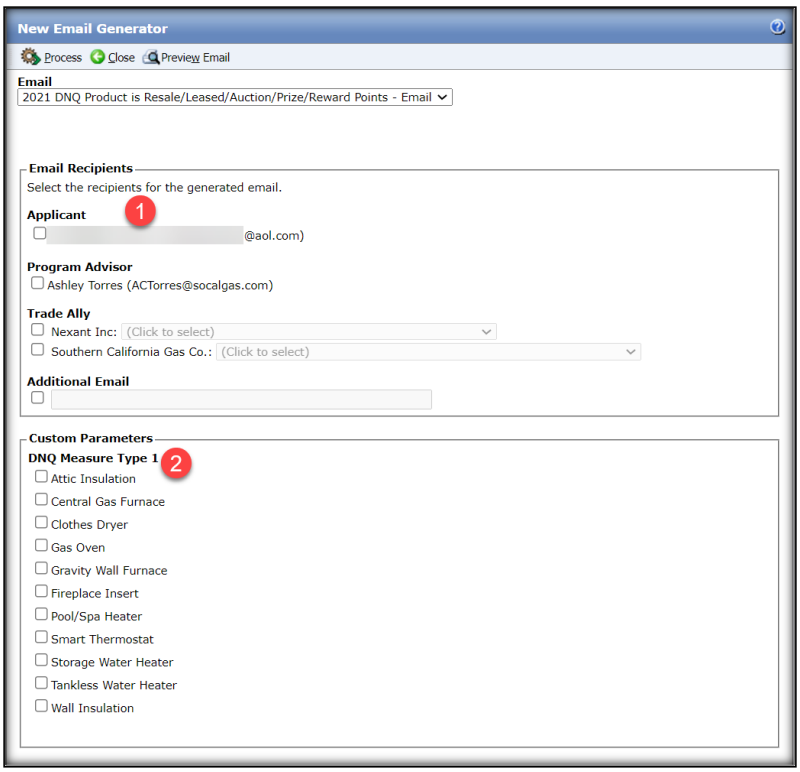
Ashley Torres, Program Manager

2021 DNQ – Product is resale/leased/auction/prize/reward points (Email/Letter)

Select "2021 DNQ – Product is resale/leased/auction/prize/reward points" when customer equipment is a purchased as a resale product or purchased at an auction. Leased, rebuilt, rented, or refurbished. Received from warranty or insurance claims. Won as a prize or received as a gift. Purchased using reward points for the total unit price.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email


SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 3 of the rebate application. The T&C explains to be eligible, products may not be*:

- Resale products, or purchased at auction
- Leased, rebuilt, rented, or refurbished
- Received from warranty, or insurance claims
- Won as a prize, or received as a gift
- Purchased with rewards points

Additionally, new parts installed in existing products do not qualify.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because the receipt indicated the **Clothes Dryer** is at least one of the above.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

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Connect with us

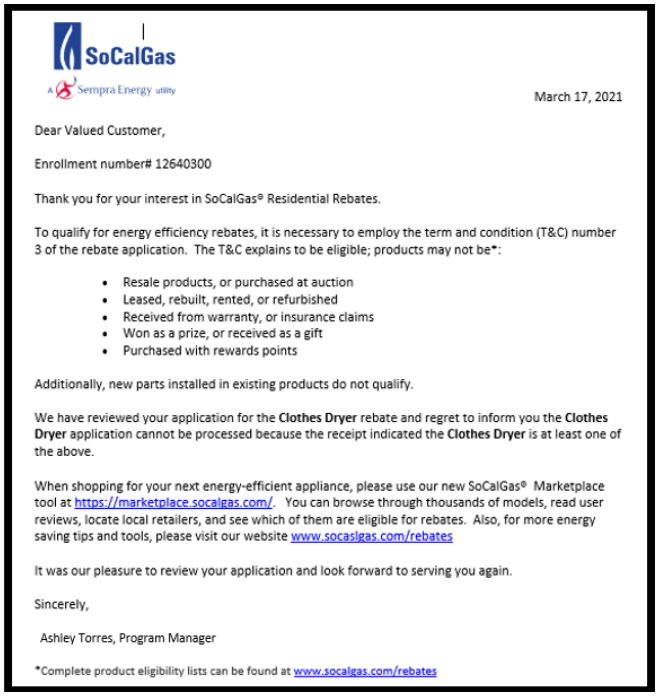
socalgas.com | Bill Assistance| Rebate Programs

Please do not reply to this email. Email sent to this address cannot be answered. For assistance, please visit our Help Center. Southern California Gas Company values your privacy. For more information, view our Privacy Policy and Privacy Notice.

Notification code: 14

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 3 of the rebate application. The T&C explains to be eligible; products may not be*:

- Resale products, or purchased at auction
- Leased, rebuilt, rented, or refurbished
- Received from warranty, or insurance claims
- Won as a prize, or received as a gift
- Purchased with rewards points

Additionally, new parts installed in existing products do not qualify.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed because the receipt indicated the **Clothes Dryer** is at least one of the above.

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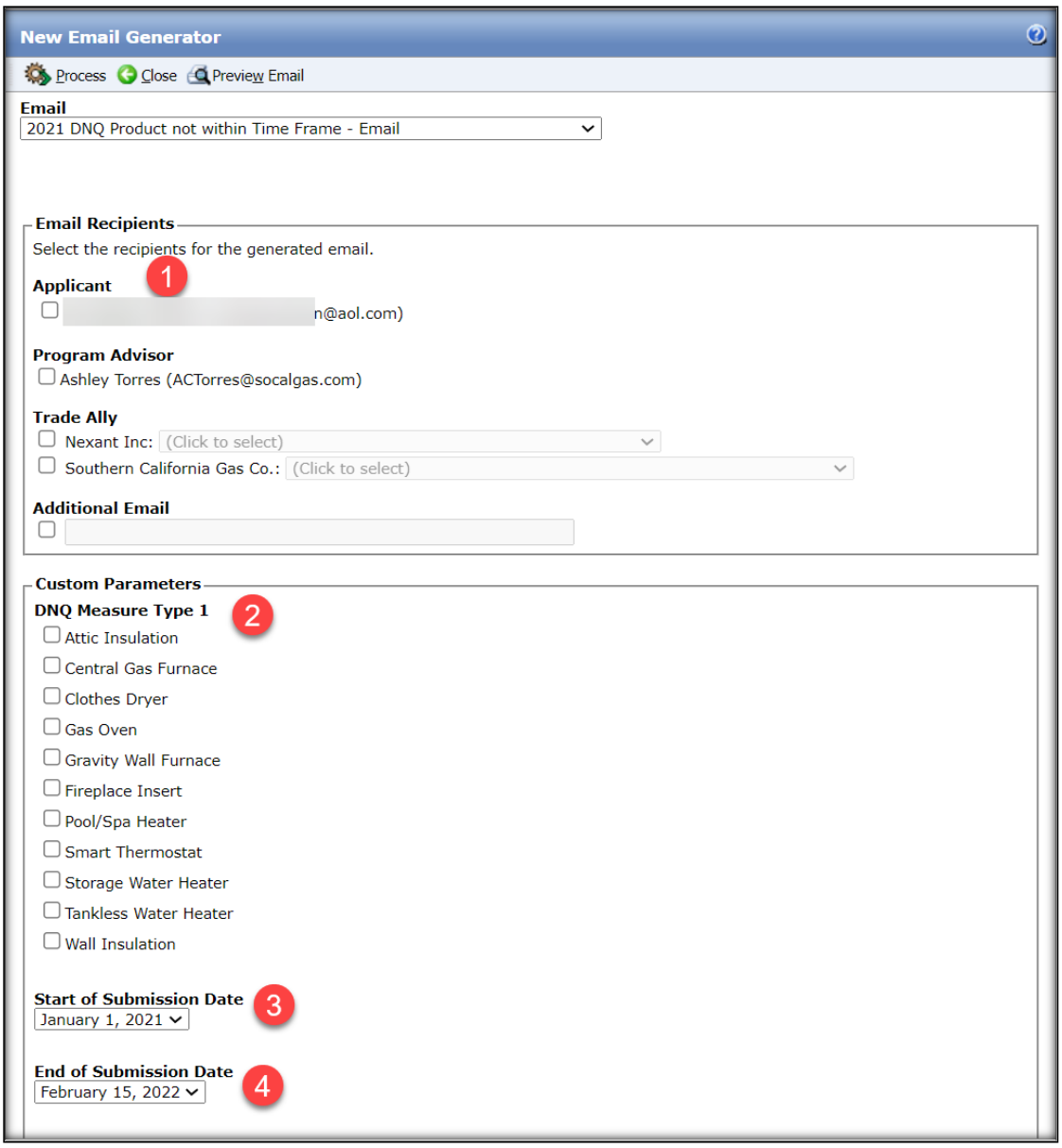
2021 DNQ – Product not within time frame (Email/Letter)

Select "2021 DNQ – Product not within time frame" when customer purchased and installed before or after the program term and therefore, is not eligible for a rebate.

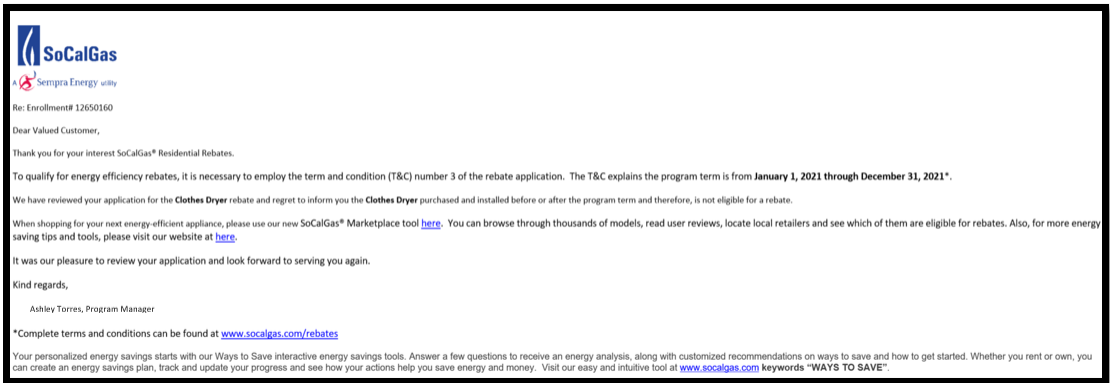
Path: Enrollment → Letter and Emails → New Email or New Letter

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type
3. Select the correct **Start of Submission Date**.
 - For example, if we are in the 2022 Rebate year, the "Start of Submission Date" will be January 1, 2022.
4. Select the correct **End of Submission Date**.
 - For example, if we are in the 2022 Rebate year, the "End of Submission Date" will be February 15, 2023.



Email



SoCalGas

A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 3 of the rebate application. The T&C explains the program term is from **January 1, 2021 through December 31, 2021***.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** purchased and installed before or after the program term and therefore, is not eligible for a rebate.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again.

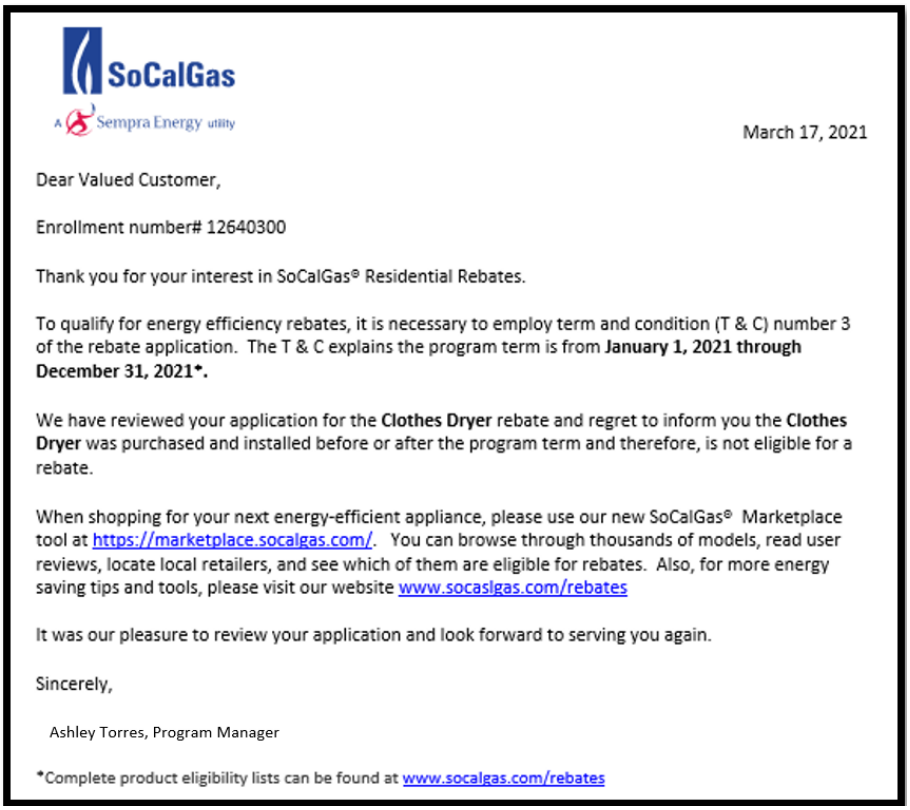
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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ term and condition (T & C) number 3 of the rebate application. The T & C explains the program term is from **January 1, 2021 through December 31, 2021*.**

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** was purchased and installed before or after the program term and therefore, is not eligible for a rebate.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool at https://marketplace.socalgas.com/. You can browse through thousands of models, read user reviews, locate local retailers, and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website www.socaslgas.com/rebates

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Sincerely,

Ashley Torres, Program Manager

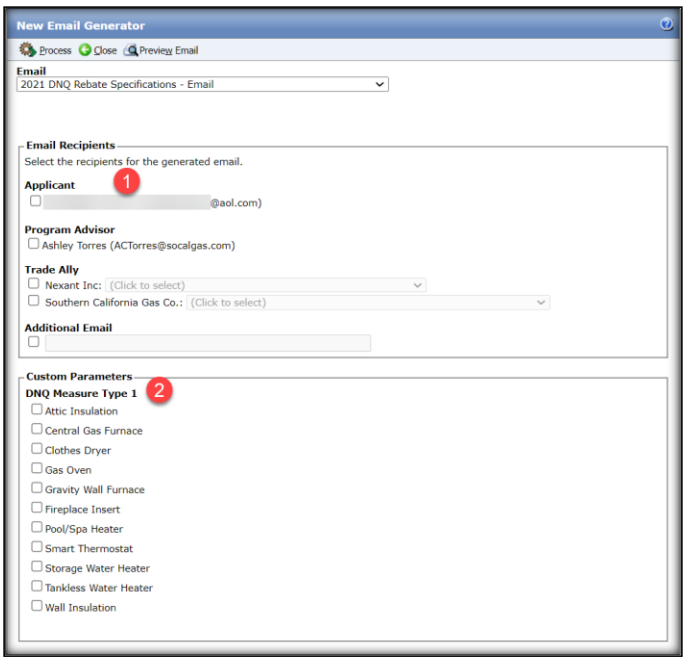
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – Rebate Specifications (Email/Letter)

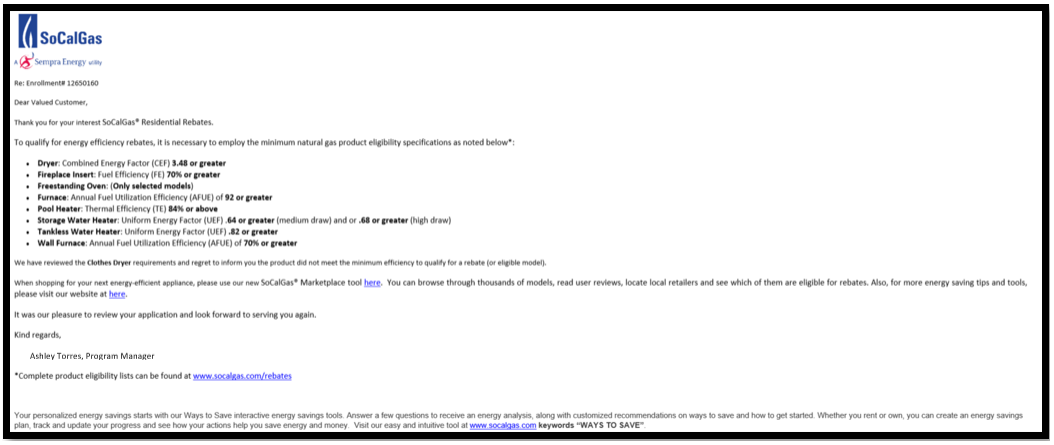
Select "2021 DNQ – Rebate Specifications" when customer purchased equipment does not meet the minimum natural gas product eligibility specification.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email



SoCalGas

A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the minimum natural gas product eligibility specifications as noted below*:

- **Dryer**: Combined Energy Factor (CEF) **3.48 or greater**
- **Fireplace Insert**: Fuel Efficiency (FE) **70% or greater**
- **Freestanding Oven**: (**Only selected models**)
- **Furnace**: Annual Fuel Utilization Efficiency (AFUE) of **92 or greater**
- **Pool Heater**: Thermal Efficiency (TE) **84% or above**
- **Storage Water Heater**: Uniform Energy Factor (UEF) **.64 or greater** (medium draw) and or **.68 or greater** (high draw)
- **Tankless Water Heater**: Uniform Energy Factor (UEF) **.82 or greater**
- **Wall Furnace**: Annual Fuel Utilization Efficiency (AFUE) of **70% or greater**

We have reviewed the **Clothes Dryer** requirements and regret to inform you the product did not meet the minimum efficiency to qualify for a rebate (or eligible model).

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again.

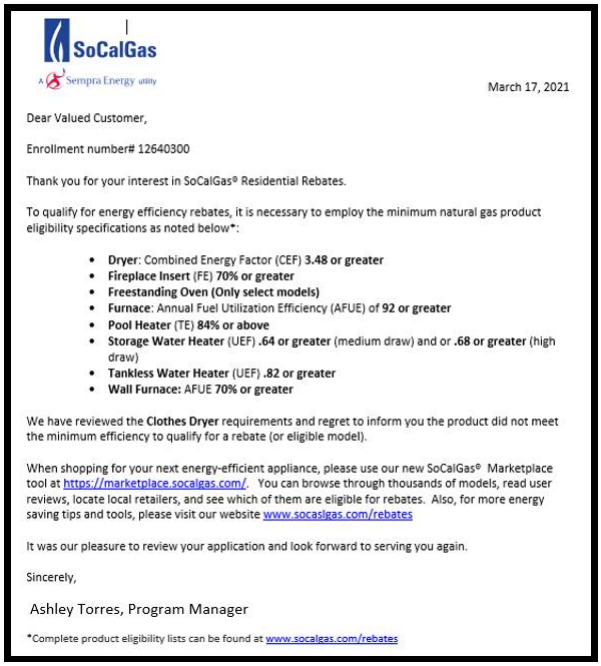
Kind regards,

Ashley Torres, Program Manager

*Complete product eligibility lists can be found at www.socalgas.com/rebates

Your personalized energy savings starts with our Ways to Save interactive energy savings tools. Answer a few questions to receive an energy analysis, along with customized recommendations on ways to save and how to get started. Whether you rent or own, you can create an energy savings plan, track and update your progress and see how your actions help you save energy and money. Visit our easy and intuitive tool at www.socalgas.com **keywords "WAYS TO SAVE"**

Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the minimum natural gas product eligibility specifications as noted below*:

- **Dryer**: Combined Energy Factor (CEF) **3.48 or greater**
- **Fireplace Insert** (FE) **70% or greater**
- **Freestanding Oven (Only select models)**
- **Furnace**: Annual Fuel Utilization Efficiency (AFUE) of **92 or greater**
- **Pool Heater** (TE) **84% or above**
- **Storage Water Heater** (UEF) **.64 or greater** (medium draw) and or **.68 or greater** (high draw)
- **Tankless Water Heater** (UEF) **.82 or greater**
- **Wall Furnace:** AFUE **70% or greater**

We have reviewed the **Clothes Dryer** requirements and regret to inform you the product did not meet the minimum efficiency to qualify for a rebate (or eligible model).

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It was our pleasure to review your application and look forward to serving you again.

Sincerely,

Ashley Torres, Program Manager

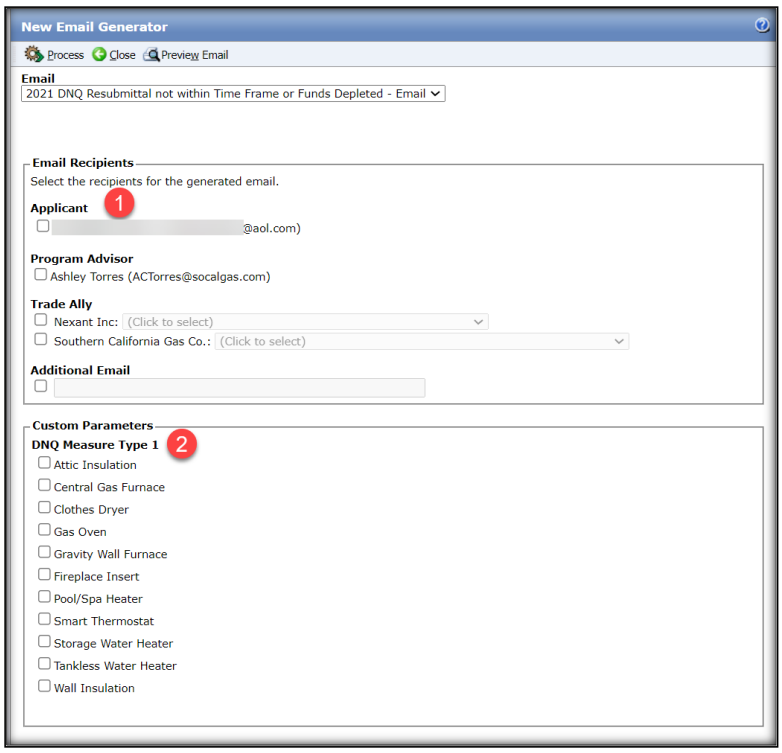
*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – Resubmittal not within time frame or funds depleted (Email/Letter)

Select "2021 DNQ – Resubmittal not within time frame or funds depleted" Email/letter when application was resubmitted after the program term and therefore, is not eligible for a rebate or funds have been depleted.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.
2. Select the measure under Inc Measure Type



Email


SoCalGas
A Sempra Energy utility

Re: Enrollment# 12650160

Dear Valued Customer,

Thank you for your interest SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 3 of the rebate application. The T&C explains the program term is from **January 1, 2021 through December 31, 2021** and that the program is available until funds are depleted*.

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed for one of the reasons below:

- Application was resubmitted after the program term and therefore, is not eligible for a rebate.
- Funds have been depleted.

When shopping for your next energy-efficient appliance, please use our new SoCalGas® Marketplace tool here. You can browse through thousands of models, read user reviews, locate local retailers and see which of them are eligible for rebates. Also, for more energy saving tips and tools, please visit our website at here.

It was our pleasure to review your application and look forward to serving you again soon.

Kind regards,

Ashley Torres, Program Manager

*Complete terms and conditions can be found at www.socalgas.com/rebates

Your personalized energy savings starts with our Ways to Save interactive energy savings tools. Answer a few questions to receive an energy analysis, along with customized recommendations on ways to save and how to get started. Whether you rent or own, you can create an energy savings plan, track and update your progress and see how your actions help you save energy and money. Visit our easy and intuitive tool at www.socalgas.com **keywords "WAYS TO SAVE"**.

Connect with us

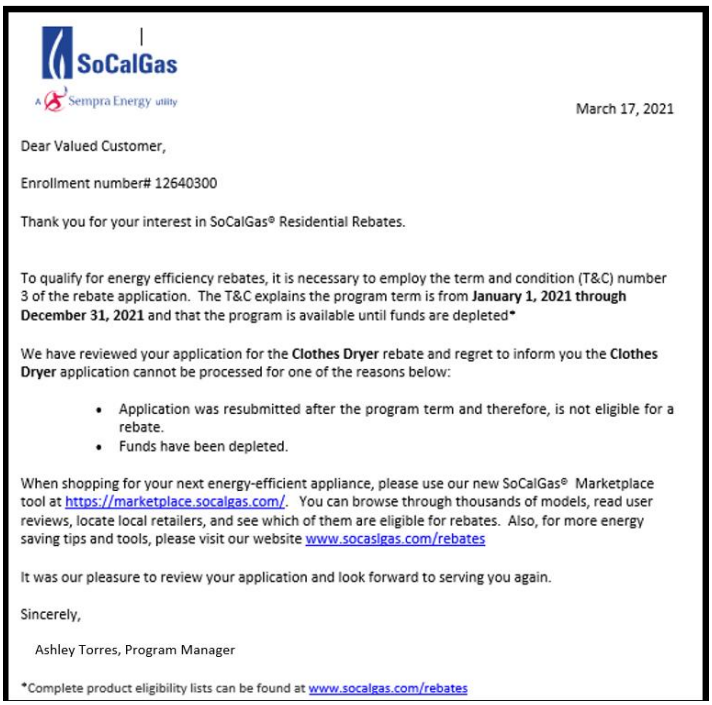
socalgas.com | Bill Assistance| Rebate Programs

Please do not reply to this email. Email sent to this address cannot be answered. For assistance, please visit our Help Center. Southern California Gas Company values your privacy. For more information, view our Privacy Policy and Privacy Notice.

Notification code: 14

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Letter



SoCalGas
A Sempra Energy utility

March 17, 2021

Dear Valued Customer,

Enrollment number# 12640300

Thank you for your interest in SoCalGas® Residential Rebates.

To qualify for energy efficiency rebates, it is necessary to employ the term and condition (T&C) number 3 of the rebate application. The T&C explains the program term is from **January 1, 2021 through December 31, 2021** and that the program is available until funds are depleted*

We have reviewed your application for the **Clothes Dryer** rebate and regret to inform you the **Clothes Dryer** application cannot be processed for one of the reasons below:

- Application was resubmitted after the program term and therefore, is not eligible for a rebate.
- Funds have been depleted.

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It was our pleasure to review your application and look forward to serving you again.

Sincerely,

Ashley Torres, Program Manager

*Complete product eligibility lists can be found at www.socalgas.com/rebates

2021 DNQ – Existing TWH replaced by a New TWH (Email/Letter)

Select "2021 DNQ – Existing TWH replaced by a new TWH" Email/letter when application states that a customer is replacing an existing TWH with a new TWH.

Path: Enrollment → Letter and Emails → New Email or New Letter

1. Select the "Applicant" under the Email Recipients section.
 - **NEVER** send to the Program Advisor and ensure applicant has an email address.
 - If no email address present, proceed to sending a letter, download it, and send to Processing Team Lead so it can be mailed to the customer.

